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COMMITTEE'S COMMUNICATIONS.

A MEETING of the INTERNATIONAL COTTON COMMITTEE was held at the Hotel Victoria, in London, on Monday, 28th September, 1936.

The President, Mr. W. M. Wiggins, of England, occupied the chair, and representatives of twelve countries were present.

RESOLUTIONS OF THE JOINT EGYPTIAN COTTON COMMITTEE.

The resolutions adopted by the Joint Egyptian Cotton Committee at its meeting in Sts-Maria, Switzerland, on July 27 and 28, 1936, were duly approved by the International Cotton Committee.

THE POSITION OF THE 40-HOUR WORKING WEEK IN THE TEXTILE INDUSTRY.

The present attitude of the cotton employers towards the proposed Forty Hours Working Week in the textile industry, as proposed by the International Labour Office, was fully discussed in the light of a very interesting paper, which had been prepared for the meeting by Mr. T. Ashurst and Mr. J. Pogson, two of the employers' representatives at the International Labour Conference held at Geneva in June, 1936.

The following resolution was put to the meeting :—

“ That this meeting expresses its thanks to Mr. Ashurst

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and Mr. Pogson for their interesting and valuable report on the proceedings of the International Labour Conference at Geneva in June, 1936, on the Draft Convention for a Forty-hours Working Week in the Textile Industry.

"It maintains its previous attitude on the question and reaffirms its opinion that any Convention relating to a universal Forty-hours Week in the Cotton Textile Industry is impracticable, and therefore strongly opposes the introduction of a Convention or Conventions for this purpose."

The following countries expressed themselves in favour of the resolutions:—

England, Germany, Japan, India, Belgium, Holland, Denmark, Czecho-Slovakia, Yugo-Slavia.

Italy opposed the resolution, whilst France abstained from voting.

FALSE-PACKED AMERICAN COTTON.

Mr. Fred Taylor, of the United States Department of Agriculture, who has been assigned by the Department to visit Europe in order to investigate spinners' complaints with regard to false-packed American cotton, gave an interesting exposé of his experiences to date during his recent investigations in Europe.

As these investigations, however, were not yet finished, he did not propose to make any statement at this stage regarding the conclusions at which he had arrived or the recommendations which he might make. The evidence he had seen in Lancashire mills, however, in the shape of false-packed and two-sided bales had convinced him that his task was only half-finished, and further investigation was needed if any good was to be the outcome of the investigation. To this end, therefore, Mr. Taylor made a strong appeal for evidence regarding false-packed bales which may be discovered by the spinner, so that samples of these bales might be sent along to Washington to substantiate any written statement which Mr. Taylor might make.

STANDARDIZATION OF MEASUREMENTS FOR THE TEXTILE INDUSTRY.

Mr. Hentschel, of the "Textilnorm," Berlin, stated that the International Standards Association had recently decided at a meeting held in Budapest to set up a special committee in order to see to what extent terms in common usage in the textile trades of the various countries could be standardized and to deal with the unification of tests on yarn and cloth under the following headings:—

1. Designation of twist for single and double yarns.
2. Degree of twist and its determination.
3. Determination of yarn counts.
4. Microscopical examination of the nature of the fibres contained in mixed yarns and cloths.
5. Determination of the nature of the colouring matters used in dyeing.

A very interesting paper was presented to the meeting by Mr. Tobler, who stated that in every industry progress was being made with standardization of terms used. The work would undoubtedly facilitate international commerce if terms used in one country were understood in all others. The International Standards Association desired the goodwill and the co-operation of the International Cotton Federation in its attempts to achieve this end.

It was decided that the best thanks of the Committee be given to the International Standards Association for submitting these proposals, and that the matter be referred to affiliated Associations for study, and that further discussion should take place on this subject at the next meeting.

INTERNATIONAL COTTON CONGRESS, EGYPT, 1937.

The President pointed out that affiliated Associations should, between now and the time for the next meeting (April, 1937), consider the question of the preparation of papers for discussion at the Congress, and also the question of the extent of their representation at the Congress in order that the Egyptian Committee might have some idea of the number of delegates for whom they would be required to cater.

The General Secretary suggested the following subjects for discussion.

1. The Forty-hours Working Week and its probable effect upon the Cotton Industry.
2. Social Legislation in the Cotton Industry.
3. The Preparation of Substitutes for Raw Cotton and their relative spinning values.
4. The Spinning of Staple Fibre.
5. Development and Possibilities of new Cotton-growing Areas.

LOOM STATISTICAL PAMPHLET, 1936.

It was unanimously decided to proceed with the compilation of the triennial issue of the International Cotton Loom Statistical Pamphlet, the figures to relate to December 31, 1936. The General Secretary was instructed to follow on the same lines as he did when compiling the publication in 1933 and in 1930.

FALSE PACKED AMERICAN COTTON.

As a result of the publicity given by the International Cotton Federation to the question of fraudulently packed American cotton, through the resolutions taken by the Federation at various International Cotton Congresses and through personal representations of Federation officials to the United States Department of Agriculture, it is evident from recent happenings in Texas that interest is being awakened in this matter.

The Texas Cotton Association and the Texas Ginners' Association are already taking steps with a view to eliminating this pernicious practice. The two following announcements were published recently by the Texas Cotton Association in the *Texas Cotton Ginners' Journal*, the official organ of the Texas Cotton Ginners' Association, Waco, Texas:—

FALSE PACKED BALES

Clause 4, Rule 4—The Texas Cotton Association

PROSECUTION OF FRAUD

“Whenever cotton is discovered by any member of the Association to be fraudulently packed, or where substitution shall have been made by changing marks or otherwise, it shall be his duty to report the same promptly to the Board of Directors, whose duty it shall then be to take measures to discover the guilty parties and to assist in prosecuting the same to conviction, all expense of such prosecution to be borne by the Association.”

The widespread interest displayed by ginners throughout the State in preventing the false packing of cotton prompts us to call attention to the rule quoted above. We know the ginning profession is opposed to the preparation of false packed bales, and we welcome the active assistance of individual ginners in combating this and all other evils which tend to destroy confidence in the integrity of Texas Cotton.

The Texas Cotton Association

THE WELFARE OF TEXAS

Those who are familiar with the world cotton situation realize that United States cotton in general and Texas cotton in particular is now confronted with the severest competition from abroad. To regain and maintain Texas' rightful place of supremacy in world cotton affairs, Texans must strive to make Texas cotton more attractive and valuable in world markets both by prevailing upon the producers to grow better varieties and by improving upon harvesting and ginning methods.

The Texas Cotton Association and the Texas Cotton Ginners' Association, recognizing a joint responsibility in popularizing Texas cotton, have entered into a campaign which it is hoped will result in a continuing improvement in the value of the State's chief crop. The principal evils which it is expected that this programme will serve to prevent are;

COMMITTEE'S COMMUNICATIONS

- 1—The ginning of wet cotton—particularly with the aid of any foreign substance such as coal oil, etc. Cotton so ginned is subject to rejection under Texas Cotton Association Trade Rules because oily cotton is worthless.
- 2—The preparation of "false-packed" bales which has been the source of increasing complaints during recent years. This situation, at the instance of foreign buyers of Texas cotton, is now being investigated by the Federal Government. The Texas Cotton Association knows that the ginning profession is opposed to unethical practices of this character, and welcomes any opportunity to assist the ginners in discouraging such evils.
- 3—Heavy weight bagging and bands and light weight bales, which are subject to penalty under the trading rules.

Through this programme being sponsored by the cotton merchants and ginners of Texas it is also hoped to encourage the production of improved varieties of cotton. The Texas Cotton Association and the Texas Cotton Ginners' Association expect to have the co-operation of the U.S. Department of Agriculture and the Texas A. & M. College in this phase of the campaign, and the two Associations invite the active support of all individual ginners and cotton merchants in this work.

Texas Cotton Association

The undermentioned comments have been extracted from the editorial of the *Texas Cotton Ginners' Journal* during September and October:—

"Texas cotton formerly commanded a premium in the world market, but this premium has vanished and many complaints have been filed against Texas cotton. During the past season this condition became alarming. Instead of growing better, it is getting worse. This problem has become the individual problem of each cotton grower and cotton ginner in Texas.

"It is hard for the average ginner or farmer to realize the seriousness of the situation. The complaints are not filed with the grower or ginner, but with the cotton shippers. The bale has lost its identity once it leaves the local compress. Regardless of its origin, it becomes a 'Texas Bale' and the complaint is against Texas cotton and not against any particular ginner or producer.

"Foreign spinners have drawn on exporters to cover losses incurred. Perhaps they have been reimbursed in all instances by Texas cotton men, but this is an unsatisfactory condition. The Texas cotton man is loser, and the cotton industry as a whole suffers.

"By active co-operation of the cotton producers and cotton

ginners, practically all complaints can and should be eliminated. If this condition is not righted, serious consequences will follow.

"The greatest number of complaints received have been in regard to the use of coal oil in the ginning of wet cotton. Other complaints received cover false-packed cotton, two-sided bales and overtared cotton, in the order mentioned.

"The use of coal oil in the ginning of cotton not only damages the lint, making the bale unfit for ordinary uses, but such damage is triple-fold; that is, in addition to lint damage, linters and cotton-seed oil both become affected, and three monetary losses incur instead of one. But the fourth loss, the loss of prestige of Texas cotton, is the greatest."

"Additional complaints in regard to false-packed cotton continue to reach the Association. Everyone knows that such practice is the exception, and compared with the number of bales ginned in the State, represents only a very small per cent of the total. But it is hard to determine whether the practice is on the increase or if the mills are just making known a condition that has existed for some time.

"Regardless of the answer, one bale of false-packed cotton is one bale too many. The cotton-ginning industry of Texas has been builded on honest service and the sacrifice of men and women who consider honesty above a tainted dollar, and any condition that casts a reflection upon the ginning industry of this State should be and must be eliminated.

"If there be those in the ginning business who wilfully false-pack cotton, then it is high time for a clean-up. Due to the nature of the marketing system, the identity of a bale of cotton is soon lost after it starts on its way to the foreign mill. Should the bale be a dishonest one, then a reflection is cast not on the guilty party, but on the Texas ginner, for the guilty party is unknown.

"If the information reaching America is true, then the charge is not only against some Texas cotton but cotton from other states as well. But it is the duty and privilege of Texas ginners to clean up at home and let other states do likewise.

"So serious has the question of false-packing become that the Federal Government now has a commission in Europe studying the question to determine the extent of the practice, and if possible to ferret out the guilty party or parties.

"Any selfish motive that tends to result in unfair ginning practices is to be deplored, but any practice that proves to be not only unethical but unlawful, resulting in grave injury to the industry as a whole, must be outlawed.

"Business is builded upon confidence. Texas is dependent upon world markets for her cotton. Despite planned farming this will remain so for ages to come. Therefore, any condition that would tend to affect the demand for Texas cotton brings untold damage.

"It goes without argument that a false-packed bale of cotton is useless to the mill. Such cotton is not wanted at any price. but a few such bales innocently shipped by some exporter can

cause heavy losses and create prejudice that is hard to live down.

"The advent of the 'bollie' was the forerunner of this condition. Modern ginning machinery makes it possible to raise the grade of snapped cotton, but no dressing-up can change a bollie from a bollie. At the close of the ginning season all ginners are forced to buy many bales of cotton in remnant lots. Naturally such cotton will vary from well-picked cotton to poorly harvested bollies. But all ginners know that regardless of the number of remnants being ginned into a bale, it is possible to thoroughly composited the cotton so as to make an even-running quality by running all such cotton through the cleaning system before ginning. This practice is usually followed.

"False-packing commands the attention of all ginners everywhere. Should any ginner know of any such condition he should report it at once. If the practice has been started, it will be stopped only by prosecution and the conviction of the guilty ones."

The Texas Cotton Association have also issued a warning to Texas ginners and farmers in regard to the ginning of wet and oil-stained cotton.

A copy of the warning notice has been circulated to every ginner in Texas for public display in the ginneries. Spinners should note the paragraph dealing with wet cotton, as ginners are urged to mark each bale the cotton of which they have been asked to gin in a wet condition, with a large "W" on the bale covering. If the spinner receives such a bale, he will in all probability be troubled in addition with gin-cut and neppy cotton.

W A R N I N G !

To the Ginners and Farmers of Texas:

WET COTTON

Cotton ginned wet with the aid of any foreign substance such as coal oil, etc., is unmerchantable and will be rejected. Wet cotton cannot be ginned without damage to the lint. All Ginners are urged to mark each bale which they may be required to gin wet as follows: (W)

Farmers are urged to bring their cotton to the gins dry. Government tests show that Farmers lose money when they have their cotton ginned wet. Numerous complaints have been received from the consuming markets regarding oily and wet ginned bales. Farmers can help themselves by helping their Ginners to turn out smoother and better cotton.

Texas cotton is dependent on foreign markets, 90 to 95 per cent. of our crop being exported yearly. This warning is, therefore, given to help Texas Farmers regain and hold their positions in these markets. The Texas Cotton Merchants and Ginners are anxious to assist in improving the Farmers' market for cotton.



AUSTRIA.

SPINNING SECTION.

The conditions in the industry have developed unfavourably during the last few months, especially as regards the decline in yarn exports. During the months September, 1935, and January, 1936, inclusive, 3,500,000 to 4,500,000 lbs. of yarn were disposed of monthly. On the other hand, sales from February, 1936, to July, 1936, inclusive, had sunk to an average of 1,500,000 lbs., and only in the month of August were raised to 2.9 million lbs.

The home market in cotton yarns is only of small importance, because not more than 15 per cent. of yarn and thread production is sold at home. The degree of occupation in the cotton-spinning industry is therefore dependent upon the capability of exporting yarns, except in those mills which own their own weaving sheds.

Imports of yarn for the first eight months of 1936 as compared with the same period in 1935 were as follows:—

	1936 quintals		1935 quintals
Grey	11,057	against	8,846
Bleached	1,865	"	1,680
Dyed	1,721	"	1,119
	<u>14,643</u>	"	<u>11,645</u>

From which it will be seen that imports have increased by about 25 per cent.

Exports for the same period were as follows:—

	1936 quintals		1935 quintals
Grey	79,762	against	52,577
Bleached	2,070	"	1,500
Dyed	633	"	633
	<u>82,465</u>	"	<u>54,710</u>

The increased exports for 1936 as against the previous year show an increase in the eight months' period of 27,755 quintals or about 50 per cent.

The previously mentioned decrease in activity for the export market only became apparent in the month of September, and therefore is not covered by the above figures.

WEAVING SECTION.

The activity in the cotton weaving section also declined to a slight extent, especially in connection with the second and third shift.

Woven goods do not show any reduction in production in metres, which is explainable by the fact that the production of finer cloths has been increased.

The import of cotton goods in the first eight months shows the following:—

	1936 quintals	1935 quintals
Grey	11,978	against 9,008
Bleached	930	977
Dyed	786	1,059
Printed	657	726
Coloured woven	1,216	1,513
	<u>15,567</u>	<u>13,283</u>

From the above it will be seen that imports have increased by 2,200 quintals or about 17 per cent. This increased import, together with decreased consumption, has had its effect upon the activity of the mills.

Wages have not shown any alteration either in the spinning or weaving sections during the last few months.

The following is the original report in German:—

BAUMWOLLSPINNEREI.

Die Beschäftigungsverhältnisse haben sich während der letzten Monate ungünstig entwickelt, was in der Hauptsache auf den Ausfall im Garnexportgeschäft zurückzuführen ist. Während in den Monaten September 1935 bis einschliesslich Januar 1936 $3\frac{1}{2}$ bis $4\frac{1}{2}$ Millionen Pfund Garne abgesetzt werden konnten, ist der Verkauf vom Februar 1936 bis einschliesslich Juli auf Durchschnittlich $1\frac{1}{2}$ Millionen Pfund gesunken und erst im Monat August wieder auf 2.0 Millionen Pfund angestiegen.

Der Inlandsmarkt hat für Baumwollgarne nur eine sehr untergeordnete Bedeutung, da nicht mehr als 15 % der Produktion in Garnen oder Zwirnen an Inlandskunden verkauft, bzw. abgeliefert werden. Die Beschäftigungslage der Spinnindustrie ist daher von dem Umfang in welchem die eigenen Webereien arbeiten können und von den Möglichkeiten des Garnexportes abhängig.

Die Garneinfuhr hat in den ersten acht Monaten des Jahres 1936 gegenüber 1935 betragen:—

	1936 q	1935 q
roh	11,057	gegen 8,846
gebleicht	1,865	1,680
gefärbt	1,721	1,119
	<u>14,643</u>	<u>11,645</u>

Es ist somit eine Mehreinfuhr um rund 25 % eingetreten.

Demgegenüber wurden ausgeführt in:—

	1936		1935
	q		q
roh	79,762	gegen	52,577
gebleicht	2,070	"	1,500
gefärbt	633	"	633
	<u>82,465</u>	"	<u>54,710</u>

Die Mehrausfuhr gegenüber dem Vorjahr hat sohin in dieser Achtmonatperiode 27.755 q. oder rund 50 % betragen.

Der früher erwähnte Rückgang in der Beschäftigung für den Export hat sich erst im Monat September ausgewirkt und kommt daher in den vorangeführten Ziffern noch nicht zum Ausdruck.

BAUMWOLLWEBEREI.

Auch die Beschäftigung der Baumwollwebereien war rückläufig, was insbesondere in einem—wenn auch nur mässigen—Abbau der 2. und 3. Arbeitsschicht zum Ausdruck kam.

In Meter-Webwaren zeigt jedoch die Produktion vorläufig noch keinen Rückgang, was offenbar darauf zurückzuführen ist, dass der Anteil der leichteren Gewebe an der Gesamtproduktion gestiegen ist.

Die Einfuhr von Baumwollgeweben in den ersten acht Monaten zeigt folgendes Bild:—

	1936		1935
	q		q
roh	11,978	gegen	9,008
gebleicht	930	"	977
gefärbt	786	"	1,059
bedruckt	657	"	726
bunt gewebt	1,216	"	1,513
	<u>15,567</u>	"	<u>13,283</u>

Sohin ist die Einfuhr um rund 2.200 q. oder ca. 17 % gestiegen. Dieser Mehrimport im Zusammenhang mit dem eher rückläufigen Konsum, hat den schon früher erwähnten Ausfall in der Beschäftigung der Betriebe nach sich gezogen.

Die Lohnverhältnisse haben weder in der Baumwollspinnerei, noch in der Weberei während der letzten Monate eine erwähnenswerte Veränderung erfahren.

BELGIUM.

As we stated in our last report, the Belgian cotton industry has been held up by a strike which lasted from June 20 to July 6, and which extended to the majority of the textile centres.

Resumption of work was brought about upon a settlement based upon a general increase in wages of 6 per cent. on the average, readjustment of wages in the case of the lower-paid male operatives, and a law enforcing the granting of six days' holiday with pay to each person having at least one year's service with the same concern.

These developments are the direct outcome of the insecurity of the international political situation. For the rest, as far as the

future position of the Belgian cotton industry is concerned, one must, before making any comment, wait and see what will be the effect of the social and economic policy which the Belgian Government has pursued.

The weaving industry complains that export business can only be done at prices which entail serious loss. It follows that the prices obtained by spinners themselves must, of necessity, be very poor.

During August, about 15 per cent. of the total number of spinning spindles were stopped.

The original text in French runs as follows:—

Ainsi que nous l'avons signalé dans notre dernier rapport, les usines cotonnières belges ont été arrêtées par une grève qui a duré du 20 juin au 6 juillet dans la plupart des centres textiles.

La reprise du travail s'est effectuée moyennant une augmentation générale de 6 pour cent des salaires, le rajustement des salaires les plus bas pour les hommes et l'octroi de 6 jours de congé payé par an au personnel ayant au moins un an de service dans une même entreprise.

Les affaires subissent actuellement les effets déprimants de l'insécurité politique internationale. Au surplus, en ce qui concerne la situation de l'industrie cotonnière belge dans l'avenir, il y aura lieu d'attendre, pour se prononcer, que se dégagent les effets de la politique économique et sociale suivie par le gouvernement belge.

Les tissages se plaignent de ce que à l'exportation les affaires ne s'enlèvent qu'au prix de sérieuses sacrifices.

Il en résulte que les prix obtenus par les filateurs sont eux aussi, très mauvais.

En août, 15 pour cent environ des broches à filer étaient arrêtées.

CHINA

Activity in the Chinese mills in Shanghai is placed at around 70 per cent. of capacity, but is expected to increase with the larger supply of cotton. The price margin for cotton yarn is reported to have increased, and sales of yarn and piece goods are said to have improved owing to generally good crops and more stable conditions in the country.

(United States Department of Commerce.)

CZECHO-SLOVAKIA.

The cotton-spinning industry has improved somewhat during the last few months. A new situation has arisen in that imports may be limited by the new exchange restriction. A new law has come into force permitting of the formation of industrial syndicates, supported by the Government, and measures taken are compulsory if they receive the support of 75 per cent. of those concerned. These measures were only very recently established, so that we cannot

say at present what the effect of them will be upon the cotton industry.

DENMARK.

The spinning and weaving mills have orders during the next four months at slightly better prices, but not for full-time working. The purchasing power in Denmark is very high, and as long as it can be kept at this level we can expect a fair volume of trade.

ENGLAND.

SPINNING SECTION.

From the point of view of production the position has been well maintained, compared with the previous quarter ending June. If we exclude those mills which are indefinitely stopped for economic reasons, the production has been in the neighbourhood of 80 per cent. of full capacity in both the American and Egyptian cottons.

This would not be so unsatisfactory if it were accompanied by a return on capital, but unfortunately such is not the case except in a very limited number of instances. It was on the ground of financial inability that the Federation recently rejected the application of the Operatives' Unions in the spinning section for a restoration of the reduction which took place in 1932, amounting to 1s. 6½d., on the current rates of wages.

MANUFACTURING SECTION.

On the whole, the state of trade in the manufacturing section has shown some signs of improvement, but rather more in the direction of enquiries than in the volume of orders actually received. Manufacturers continue to be handicapped by the low prices offered and continued reluctance of buyers to place orders in bulk.

There has been no relaxation of the intense competition in the export trade, which is suffering from the restrictions placed upon imports of textiles by many countries. In the home market the demand has not shown any marked change.

Production during the last quarter has been somewhat irregular owing to the annual holidays in various towns during August and early September. The political situation abroad has also had a restraining influence.

FRANCE.

We reported in the last issue of the INTERNATIONAL COTTON BULLETIN that changes in working conditions which took place towards the end of the second quarter and the enactment of the new social laws had led to a reduction in business. Since that time, notably in September, an improvement has been experienced in

demand, principally brought about, we believe, by the reduction in production resulting from the strikes and the granting of holidays with pay, together with the possibility of an increase in prices of French cotton goods.

The degree of activity of the industry actually shows an increase due to the loss in working time occasioned by the strikes and holidays with pay. At the same time, it is too early as yet for our statistics to permit us to show accurately the percentage of activity in the mills either in the spinning or the weaving section. We would point out in passing that in the month of August, as a result of the law in regard to paid holidays, the degree of occupation in a large number of cotton mills did not average more than 52 per cent. of full time production. At the same time, the strikes which had been brought about by the disputes in regard to collective agreements in the spinning sections of Lille and Vosges have entailed a general average reduction in activity of the whole industry for the month of September.

The collective agreements for work have been put into force in the different cotton industrial districts. The wages fixed by the agreements represent a considerable increase upon the wages previously paid, varying according to the category of the operative and in accordance with the district, but nevertheless they are very considerable.

The figures for exports will be found in the original French report below:—

Nous indiquions dans le *Bulletin* 56 que les mouvements ouvriers qui se sont produits à la fin du second trimestre et le vote de nouvelles lois sociales avaient amené une raréfaction des affaires. Depuis lors et notamment en Septembre on a constaté une amélioration de la demande principalement causée, croyons-nous, par les réductions de production qu'ont entraîné les grèves et l'application des congés payés, ainsi que par la perspective de hausse des articles cotonniers français.

Du fait également du retard de production occasionné par les grèves et les congés payés, l'activité de l'industrie s'est actuellement accentuée. Toutefois nos statistiques ne nous permettent pas encore d'indiquer le pourcentage d'activité des usines tant en filature qu'en tissage. Signalons en passant qu'au mois d'Août, par suite de l'application de la loi sur les congés payés dans un grand nombre de manufactures cotonnières, le degré d'occupation de l'industrie n'a été que d'environ 52 pour cent. De même les grèves auxquelles ont donné lieu les discussions relatives aux contrats collectifs dans le centre de Lille et la région des Vosges ont fait subir une réduction à l'activité générale moyenne de l'industrie pour le mois de Septembre.

Des conventions collectives de travail ont été mises en vigueur dans les différentes régions cotonnières. Les salaires fixés par ces conventions représentent des augmentations sensibles sur les salaires précédemment payés, variables suivant les catégories d'ouvriers et suivant les régions, mais parfois très considérables.

STATE OF TRADE REPORTS

IMPORTATIONS ET EXPORTATIONS

IMPORTS AND EXPORTS

						2ème trimestre and Quarter	
						1935	1936
						en Quintaux métriques	In Metric Quintals
A—Importations : (<i>Imports</i>)							
1. Fils de coton	..	..	..	..	..	1,037	1,546
(<i>Cotton yarn</i>)							
2. Tissus de coton	..	..	..	..	..	2,410	2,233
(<i>Cotton piece goods</i>)							
B—Exportations : (<i>Exports</i>)							
1. Fils de coton : Exportations totales	..	..	..	..	..	24,887	15,127
(<i>Cotton yarn—total exports</i>)							
Destinations : (<i>Countries of Destination</i>)							
Algérie, Colonies et Pays de Protectorat	..	..	..	..	..	4,467	5,344
(<i>Algeria, Colonies and Protectorates</i>)							
Marchés étrangers	..	..	..	..	..	20,420	9,783
(<i>Foreign markets</i>)							
2. Tissus de coton : Exportations totales	..	..	..	..	..	91,475	86,215
(<i>Cotton piece goods—total exports</i>)							
Algérie, Colonies et Pays de Protectorat	..	..	..	..	..	82,691	79,492
(<i>Algeria, Colonies and Protectorates</i>)							
Marchés étrangers	..	..	..	..	..	8,784	6,723
(<i>Foreign markets</i>)							

(Syndicat Général de l'Industrie Cottonnière Française)

GERMANY.

SPINNING SECTION.

The German spinning industry has been fairly well maintained during the past two or three months. German spinners are complaining at the very cheap prices at which English yarns, both Egyptian and American types, are being offered in that country.

WEAVING SECTION.

The number of orders received in the weaving section during the third quarter was on the average higher than for the first and second quarters of this year.

The degree of occupation in the mills themselves was comparatively unchanged, not taking into account the reduction in production due to operatives' holidays, because some orders were carried over into the fourth quarter.

The use of yarns, either wholly or partly made from staple fibre (Zellwolle) has increased in quantity. In regard to the question of quality also great improvements have been made.

The following is the original report forwarded by the *Süd-deutsche Bezirksgruppe der Fachuntergruppe Rohweberei, der Fachgruppe Baumwollweberei*:—

Der Auftragsbestand der Weberei war für das 3. Quartal durchschnittlich höher als für das 1. und 2. Quartal.

Der Beschäftigungsgrad der Werke selbst war, abgesehen von der Verminderung durch den Arbeiterurlaub, im wesentlichen unverändert, da einige Aufträge teilweise in das 4. Quartal herübergenommen wurden.

Die Verwendung von Garnen, ganz oder teilweise aus Zellwolle, hat sowohl im Bezug auf Menge als auch im Bezug auf Qualität weitere erhebliche Fortschritte gemacht.

HOLLAND.

COTTON SPINNING.

Conditions in the spinning section of the trade remain unsatisfactory. The demand from the local mills remains about unchanged, and most mills are working with a reduced output. Competition from England, and also from Belgium in certain counts, is still very severe, and in consequence thereof prices remain unremunerative.

COTTON MANUFACTURING.

There is very little change in the position of the weaving mills. The demand for the home market remains fairly stable, and the export trade is chiefly limited to those markets where quotas or other preferential conditions exist. There is a little export trade in specialities, but on the whole this business is not extensive, and the cost of production in the Netherlands is higher than in most western European countries.

ITALY.

The Association of Italian Corporations reports that the wages of operatives in cotton mills have been increased as follows:—

Male operatives by 7 per cent.

Female operatives by 5 per cent.

Clerical staffs by 7 per cent.

Three hundred thousand workers benefited from these increases. Wage increases also took place in most other industries and were brought about, the President of the Association states, to offset the rise in the cost of living which has taken place during the last few months.

As regards the degree of activity, little change has taken place during the last few months.

JAPAN.

Production in Japan has recently been a little better. There has been a tendency to increase the number of spindles, but a body known as "Cotton Goods Export Association" has come into being, the function of which is to adjust production intended for export. On account of this innovation the tone of the industry is a little healthier than it was a few months ago.

Production of cotton yarn during August amounted to 292,000 bales compared with 295,000 in July and 282,000 in August, 1935, according to a report issued recently by the United States Department of Commerce.

POLAND.

DEGREE OF OCCUPATION OF COTTON MILLS,

July 6 to August 2 1936—	89.43	per cent. of full time production (48 hours)
August 3 to August 30, 1936—	106.95	" " "
" 31 to Sept. 27, 1936—	112.08	" " "

EXPORTS

	Cotton yarn.		Piece goods.		Clothing
	value	weight	value	weight	weight
	zl.	kg.	zl.	kg.	kg.
July, 1936	—	—	155,026	28,620	131,529
August, 1936	3,304	996	336,717	59,510	114,052
September, 1936 ..	3,194	972	494,010	99,290	104,078

(*Zrzeszenie Producentów Przędzy Bawełnianej w Polsce.*)

PORTUGAL.

The demand for cotton goods declined during the first half of 1936, according to local manufacturers. This is attributed to the lower agricultural income resulting from the unfavourable climatic conditions in some districts. The demand from the colonies likewise declined. Foreign competition is said to be increasing. The cotton manufacturers have asked the Government for additional protection in Portugal and in the colonies, pointing out that while the mills worked full time and more in 1933, 1934 and 1935, they are now able to work only four or five days a week, and that, with a smaller proportion of active machinery. They stated that stocks of goods are abnormally large, and they will have to reduce activity still further unless there is an improvement in demand.

Although the conditions in the cotton industry have been less favourable, cotton imports for the first five months of 1936 were slightly higher than during the corresponding period of 1935 (9,267 metric tons against 9,041 tons), according to official figures. Arrivals of American cotton at Oporto for the first half of 1936, on the other hand, declined to 14,000 bales from 19,000 bales for the first six months of 1935, according to trade reports. Official figures for cotton imports, in metric tons, for the past five calendar years are as follows:—

	1935	1934	1933	1932	1931
Total	22,282	21,647	21,661	21,382	14,787
United States	12,403	11,049	16,580	16,605	9,933
Brazil	4,159	5,387	314	246	2,222
Egypt	1,002	740	612	239	44
India	294	552	286	295	180
Colonies :					
Mozambique	1,542	1,919	1,557	1,084	146
Angola	828	719	791	708	639

Colonial cotton not only enjoys Portuguese tariff protection and

colonial export bounties, but has an assured market in the mother country since manufacturers are obliged to purchase, at prices fixed by the Government, all the cotton imported from the colonies.

(United States Department of Commerce.)

SWITZERLAND.

Both in the fine spinning and weaving sections a satisfactory degree of business continued into the third quarter of 1936. Business in the doubling section fluctuated disappointingly, the mills being hampered by a sad lack of orders.

In the coarse spinning and weaving section reports state that business is still worse, and the same applies to the coloured weaving section. In every branch low prices prevail.

The reduction of the Swiss rate of exchange during the last few days of September has brought about a certain amount of activity in order to take advantage of lower prices as old contracts are being disposed of.

The original report in German is as follows :—

In Feinspinnerei und -weberei hat die befriedigende Beschäftigung auch im dritten Quartal angehalten. Die Zwirnerei zeigte vermehrt Schwankungen im ungünstigen Sinne, die Betriebe mit unbefriedigendem bis schlechtem Geschäftsgang überwogen. Noch trüber lauten die Berichte aus der Grobspinnerei und -weberei einschliesslich der Buntweberei. Auf der ganzen Linie hielt der scharfe Preisdruck an. — Die Abwertung der Schweizervalluta in den letzten Septembertagen hat insofern etwelche Belebung gebracht, als alte Kontrakte in beschleunigtem Tempo zur Lieferung disponiert wurden, um dem zu erwartenden Preisaufschlag zu entgehen.



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1935-36.

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ARGENTINA.

In the year 1935-36 the *Junta nacional del Algodón* conducted a census of the area under cotton in the Republic. The results of this census indicate that 783,382 acres were cultivated in 1936, or 10.8 per cent. more than in the preceding year. Compared with the average of the years 1929-30 to 1933-34 the increase is 120.4 per cent. The figures show the striking development which has taken place in cotton-growing in Argentina.

Compared with the previous estimate made in January, 1936, the new estimate is about 14 per cent. smaller. Much of this decrease is due to the drought which has prevailed in all areas at sowing time and to the damage caused by the heavy rains of December and January in the Chaco and in Corrientes, where 80 per cent. and 8 per cent. respectively of the total cotton area is situated.

The total number of holdings (*chacras*) which grew cotton in 1935-36 was 25,929, with an average of 30.1 acres per holding. 14,319 of these holdings were in the Chaco, with an average of 44.5 acres per holding.

The first estimate places production at 1,691,000 centals (353,800 bales) of ginned cotton against 1,411,800 centals (295,400 bales), last year and an average of 772,600 centals (161,600 bales) in the period 1929-30/1933-33; percentage, 119.8 and 218.9. The average ginning outturn works out at 27.1 per cent. The number of ginneries set up in the whole country is 125.

(*International Institute of Agriculture.*)

COTTON AREA AND PRODUCTION IN ARGENTINA DURING THE LAST 16 YEARS

Year		Area Sewn (hectares)	Seed cotton	Production Lint (tons)	Seed
1920/1-1924/5	.. ..	45,902	29,195	8,401	20,207
1925-26	.. ..	110,058	103,263	29,347	72,057
1926-27	.. ..	71,746	43,193	12,525	29,803
1927-28	.. ..	85,000	82,765	24,920	56,337
1928-29	.. ..	99,000	92,644	25,690	64,519
1929-30	.. ..	122,000	115,404	32,614	79,240
1930-31	.. ..	127,394	107,324	30,051	74,483
1931-32	.. ..	136,159	124,994	36,686	84,333
1932-33	.. ..	138,500	113,318	32,511	78,144
1933-34	.. ..	195,000	155,236	43,357	106,833
1934-35	.. ..	286,147	238,285	64,038	164,187
1935-36	.. ..	317,019*	283,000†	76,000†	196,000†

* According to census.

† First estimate of the cotton section of the Ministry of Agriculture.

COTTON GROWING

EXPORTS OF ARGENTINE COTTON

Month	1935		1936	
	Quantity in kilos.	Value in Argentine \$	Quantity in kilos.	Value in Argentine \$
January ..	375,785	313,482	1,826,886	1,367,425
February ..	298,873	254,341	2,262,883	1,672,270
March ..	293,710	227,545	970,879	738,530
April ..	2,348,805	1,822,673	1,767,369	1,402,850
May ..	3,708,804	2,948,500	5,714,089	4,365,955
June ..	5,089,941	3,941,811	7,052,543	5,507,075
July ..	5,354,166	4,110,662	—	—
August ..	7,730,886	5,494,727	—	—
September ..	4,590,952	3,211,370	—	—
October ..	2,585,986	1,944,743	—	—
November ..	1,282,201	1,039,516	—	—
December ..	2,668,461	2,170,066	—	—
Total ..	36,328,570	27,479,436	19,594,649	15,054,105

(Argentine Ministry of Agriculture.)

BRAZIL.

The following cotton crop estimate for the whole of Brazil was issued by the Ministry of Agriculture, being the first estimate for the present season:—

SOUTHERN ZONE:—

	kgs.
Bahia (perennial)	1,000,000
Minas Geraes	20,000,000
Sao Paulo	170,000,000
Parana	4,000,000
Estados	1,000,000
Total of Southern Area	196,000,000

NORTHERN ZONE:—

Para	3,000,000
Maranhao	12,000,000
Piauby	6,000,000
Ceara	25,000,000
Rio G. do Norte	25,000,000
Parahyba	40,000,000
Pernambuco	30,000,000
Alagoas	14,000,000
Sergipe	12,000,000
Bahia (annual)	9,000,000
Total of Northern Area	176,000,000
Grand total	372,000,000

NORTH BRAZIL.

According to a report issued recently by the Bank of London and South America, there is very little business passing in the cotton market, and none is coming in. Little rain has fallen during the last fortnight, and the condition of the crop is less favourable

in consequence. In fact, owing to the lack of rain, the crop is expected to be much smaller than had been anticipated, a reduction of as much as 40 per cent. of the yield previously estimated being thought likely. A further improvement in prices has taken place.

Exports of cotton during the season ended July 31, 1936, reached 11,851,703 kilos, valued at 41,108 contos. The volume and official value of shipments to the principal destinations were: Antwerp, 2,696,656 kilos worth 9,537 contos; Osaka, 1,728,942 kilos and 5,891 contos; Liverpool, 1,667,787 kilos and 5,497 contos; and Hamburg, 1,138,871 kilos and 4,095 contos.

SÃO PAULO.

Planting of the next State of São Paulo cotton crop will begin in early October. Preparations have been made for a much larger crop than that picked this season, and, should climatic conditions prove favourable, the yield should be well in excess of 200,000 tons. It is interesting to note that, at a meeting of members of the Japanese Colony recently held in São Paulo, it was stated that during 1936 Japanese planters produced approximately 56 per cent. of the crop in the State of São Paulo and some 30 per cent. of the whole of the Brazilian production.

São Paulo advices confirm that there is a remarkable improvement both in the quantity and quality of raw cotton produced in São Paulo during the present season, compared with last year. The percentage of high types this year is reported to have increased by approximately 100 per cent., and so far 9,000 tons more of the fine grades have been prepared for the market, while the quantity of types 4 and 5 advanced to a still greater extent, whereas the lower grades have diminished in an encouraging manner.

The official estimate of the Paulista cotton crop for the current season is 165,000 tons, or roughly 950,000 bales of 170 kilos each, and compares with actual production in 1934-35 of 98,206 tons and 102,295 tons in 1933-34.

Up to the end of July, 137,619 tons, representing 794,524 bales, had been classified.

There is a steady demand for the cotton on offer. Japan continues to be a heavy buyer, and it is claimed that exports to that country will exceed 300,000 bales, or nearly one-third of the crop.

CHINA.

The Chinese Cotton Statistics Association, 260, Avenue Edward VII, Shanghai, published on August 20, 1936, its first estimate of the cotton crop in China for 1936 as follows:—

AREA	..	..	55,041,066 mow (6·586 = one acre).
YIELD	..	..	16,379,194 piculs (133 lbs. = 1 picul).

The above figures are based on the condition prevailing previous to August 15, 1936, as reported by the twelve provinces of Hopeh, Shantung, Shansi, Honan, Shensi, Hupeh, Kiangse, Anhwei, Kiangsu, Chekiang, Szechuen, Hunan, and the two municipalities of Shanghai and Tientsin.

For comparison, the figures of area and yield published in the

first and second estimates of 1935 and the final estimates of 1935, 1934, 1933 and 1932 are given below:—

	Area (mow)	Yield (picul)
First estimate, 1935	36,212,768	9,596,684
Second estimate, 1935	35,485,818	8,391,018
Final estimate, 1935	35,025,894	8,142,911
Final estimate, 1934	44,971,264	11,201,999
Final estimate, 1933	40,454,023	9,774,207
Final estimate, 1932	37,099,800	8,105,637

The following are the figures of area and yield of the different provinces in the first estimate of 1936 compared with the final estimate of 1935:—

	Area 1936	Yield 1936	Area 1935	Yield 1935
Hopeh	9,497,177	2,975,297	6,315,970	2,166,477
Shantung	6,091,514	1,848,849	1,801,137	407,215
Shansi	2,095,932	625,528	1,067,902	252,592
Honan	6,056,634	1,496,276	1,795,360	416,778
Shensi	4,235,191	1,147,775	3,657,014	802,053
Hupei	8,458,705	3,022,394	4,568,339	917,184
Hunan	744,720	294,390	371,188	42,194
Kiangse	235,530	59,705	199,740	42,481
Anhui	1,420,000	545,300	1,330,453	208,079
Kiangsu	10,493,486	2,434,543	10,257,553	1,977,620
Chekiang	1,722,087	666,057	1,759,492	461,936
Szechuen	3,990,090	1,263,080	1,901,746	448,332

The 1936 Chinese cotton crop is now estimated at 3,400,000 bales (478 lbs. net weight) as against 2,600,000 bales last year. Dry weather experienced in North China is not expected to reduce the crop in that region, where the 1936 crop was planted on an acreage considerably larger than that of 1935. The crop in the lower Yangtze Valley also will show a material increase over that of 1935.

Should the Chinese crop this year reach the present estimate of 3,400,000 bales, China would be able to export some 300,000 bales during 1936-37, most of which would go to Japan. Purchases of Chinese cotton for export to Japan will depend upon its price relative to Indian cotton. At the present time, it is estimated that the price of Chinese cotton would have to be reduced somewhat in order to compete successfully with Indian. Should the price of Chinese cotton fail to decline before October, when the new Indian crop appears on the market, a greater price reduction thereafter would be necessary in view of the fact that the new Indian crop is expected to sell at prices about 5 per cent. below those paid for the old crop.

Owing to the small volume of stocks now at hand, Japanese and Chinese mills are keenly interested in securing new-crop supplies of Chinese cotton, some of which will be available early in September. If the price of native cotton declines sufficiently, Chinese millowners will be in a better position than heretofore to compete with mills in Japan for supplying export requirements of certain classes of piece goods.

Demand for foreign cotton for the forthcoming season is not expected to fall below the present low levels. Considering the requirements for certain types of yarn and the light stocks of foreign cotton, imports may equal or even exceed those of this season. Total June imports of 15,383 bales, included 2,885 bales of American cotton. For the period of October, 1935, to June, 1936, China imported a total of 151,331 bales compared with 232,484 bales for a similar period a year ago. The volume of American cotton imported during these two periods amounted to 48,612 and 115,001 bales respectively. Cotton imports from sources other than the United States also declined, but on the whole the reduced imports were chiefly at the expense of American cotton. For the first time an appreciable volume of Brazilian cotton was purchased.

CHOSEN.

The 1935 cotton area in Chosen is estimated at 362,000 acres of upland and 152,000 acres of native cotton, as against 327,000 and 147,000 acres, respectively, in 1934, according to information received. Production of cotton in 1935 amounted to 155,197 bales (of 478 lbs.) of upland and 33,916 bales of native in comparison with 110,322 and 26,536 bales respectively in 1934. The yield has shown a considerable increase. In 1935 it was 205 lbs. per acre of upland and 107 lbs. of native as against 101 and 86 lbs. respectively in 1934. The increase in acreage was due to official encouragement of cotton planting, while the increase in yield per acre was attributed to favourable weather conditions.

(United States Department of Agriculture.)

ECUADOR.

The first crop was reduced by late rains, but the second crop is reported satisfactory and of good quality, although no estimates as to the quantity are available as yet. Shipments of old crop cotton continued in July, mainly to Germany, and limited quantities to Great Britain and France.

(Textile Raw Materials.)

GREECE.

According to information received from the Greek Cotton Institute, the crop situation improved considerably during July. The rains which fell in May and June, and even in July were specially favourable to cotton grown in the non-irrigated regions. On the other hand, cotton grown on irrigated land suffered from excessive humidity. The plantations in the Peloponnesus are in a very satisfactory condition, those in Continental Greece are not quite so satisfactory. In Thessaly there is a noticeable improvement, while in Macedonia the improvement is still greater and is even more rapid. Hoeing is progressing well everywhere; two and

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even three hoeings are being attempted this year as against one only last year.

Up to the present no important damage has been caused by disease or by parasites.

A recent survey made by the Greek Cotton Institute shows that the area sown to cotton this year, classified by regions, is as follows:—

		1936 acres	1935 acres
Macedonia-Thrace	.. ..	40,279	37,280
Thessaly	.. ..	16,136	10,873
Continental Greece	.. ..	98,152	75,319
Peloponnesus	.. ..	17,347	9,291
		<hr/> 171,914	<hr/> 132,772

HAITI.

An interesting bulletin summarizing the work of developing cotton production in Haiti has just been published by the National Ministry of Agriculture of the Republic. The bulletin was written by Dr. H. D. Barker, who has just returned to U.S.A. after eleven years in Haiti.

The bulletin summarizes the results obtained by selection from 1930 to 1936 together with general observations on the growth of cotton in the country.

In his general remarks, Dr. Barker says the results of the work of selective cultivation have been very satisfactory. Despite the excellent results obtained as regards strength and texture, he thinks an improvement on the present report both probable and very desirable. The experiments in spinning have shown that the Haitian yarns, particularly doubled yarns, are not as durable as Egyptian yarns of the same length of staple, though at the same time the Haitian fibres, taken individually, are very strong. This fact, Dr. Barker observes, has not been explained satisfactorily, but it is none the less true that the toughness of a yarn rests not only on the strength of individual fibres, but also on their fineness, age, and other essential qualities.

Much attention has been paid since 1930 to this fault in the Haitian cotton when choosing plants for fresh study. Nevertheless, Dr. Barker holds that other work in selective production will still have to be undertaken to remedy this fault so plainly manifest in the spinning tests.

(“*Manchester Guardian Commercial*.”)

MEXICO.

The Mexican Ministry of Agriculture reports that North-eastern Mexico bids fair ere long to become the scene of feverish activity, that may even assume the proportions of a boom, as the cotton-picking season approaches, for the area planted this year was greatly extended. This was due to the fact that enormous tracts in the States of Nuevo Leon and Tamaulipas were placed under this crop, conditions having proved so favourable that the per hectare yield is estimated at a considerably higher figure than in former years. Another favourable circumstance is that the cotton

market holds up satisfactorily, so that big deals in futures have been closed.

Cotton production this season promises to be the greatest in the history of the Mexican cotton-growing industry, the Agricultural Ministry estimates. Up to mid-September, 348,000 bales weighing 230 kilograms each had been harvested. Coahuila and Durango States have the greatest cotton yield this season. They contributed 176,087 of the harvested bales. Tamaulipas and Chihuahua States will be the next best cotton producers this year.

It is estimated by the Department of Agriculture of Mexico that the area planted to cotton for the 1936 crop will reach 300,000 hectares of 2.47 acres each. This would represent an increase of 63,000 hectares over the acreage planted in 1935.

NICARAGUA.

Serious damage to the crop by grasshoppers is reported in the Carazo district, according to local authorities. However, some crop estimates early in August still placed the crop at about 12,000 bales.

(Textile Raw Materials.)

NIGERIA.

By the end of June the ginning of cotton was finished, the quantity ginned being 192,000 centals (40,000 bales of 478 lbs.) against 195,000 (40,900) last season. 657,000 centals (32,800 short tons) of seed cotton were purchased during the season against 659,000 (33,000) last season.

(International Institute of Agriculture.)

PARAGUAY.

It is calculated that the total crop will amount to not more than 8,000 tons of fibre or less than 50 per cent. of former estimates. During the month an export tax of 2 per cent. was imposed, which constitutes a direct charge on shippers. Prices have improved to \$18.50 Parag. per kilo for seed cotton placed in Asunción or Villeta. Approximately 6,000 tons of fibre have already gone forward.

(Bank of London and South America.)

PERU.

During the first six months of the present year, 25,072,445 kilos of cotton were exported from Peru as against 19,292,362 kilos for the corresponding period of 1935.

5,340 tons were shipped to Bremen, 2,161 tons to Hamburg, 1,726 tons to Kobe, and 2,459 tons to Osaka; shipments to Great Britain amounted to 1,823 tons.

SUDAN.

The Sudan Government Department of Agriculture and Forests has issued the following cotton progress report for the month ending April 30, 1936, season 1935-36:—

	Area, Feddans	Picked to date, Cantars (315 R.)	Estimated Total Crop, Cantars (315 R.)	General Remarks	Last Season Yield, Cantars Feddans (315 R.)
Sakellaridis Irrigated—					
Gezira :					
S.P.S., Ltd. ..	164,178	601,436	678,000		156,040
K.C.C. ..	20,562	75,203			19,143
Tokar ..	14,053	28,343			31,681
Kassala ..	36,257	58,000	66,000		28,210
Dueim ..	500	2,753	2,753	Final	500
Private Estates ..	7,570	22,307	23,100		6,346
	<u>243,120</u>	<u>788,042</u>	<u>805,408</u>		<u>241,920</u>
					<u>919,610</u>
American Irrigated—					
Northern Province :					
Berber P.S. ..	2,549	6,600	6,600	Final	2,482
Dongola P.S. ..	2,302	9,185	9,185	Final	2,185
Zeidab ..	5,561	20,615	20,615	Final	5,854
Other Private Estates	1,400	3,463	3,463	Final	1,900
	<u>11,812</u>	<u>39,863</u>	<u>39,863</u>		<u>12,421</u>
					<u>34,022</u>
American Raingrown—					
Kordofan ..	95,000	91,642	91,642	Final	80,000
Upper Nile ..	6,800	5,131	5,143		4,500
Mongalla ..	21,236	22,009	22,009	Final	12,416
	<u>123,036</u>	<u>118,782</u>	<u>118,794</u>		<u>96,916</u>
					<u>144,137</u>
Total, all varieties	<u>377,968</u>	<u>946,687</u>	<u>964,065</u>		<u>351,257</u>
					<u>1,097,778</u>

UGANDA.

In most districts dry weather conditions were experienced during July, and although this, to some extent, delayed planting, the acreage at the end of the month was substantially above the corresponding figure for last season (885,000 acres as compared with 772,000, that is, an increase of 14.8 per cent.). In some areas the quality of the seed appeared to have been affected by being stored in a wet condition due to the abnormal rains during marketing. These difficulties had been met by replacing with good seed, and given normal weather conditions no unfavourable results were expected. The early-sown cotton was well established, and the fact that it forms a larger proportion of the crop than usual is itself favourable.

(*International Institute of Agriculture.*)

U.S.S.R.

The month of July was very hot and dry in all the cotton-growing districts. These conditions were generally speaking very favourable for the formation and ripening of the bolls. In the southern regions of Tadzhikistan the American cotton bolls were almost ripe at the end of the month and some bolls opened. By July 20 the fourth stage of the preparation of plots and hoeing had been accomplished throughout the Union for a total of 68 per cent. of the planned amount. In Uzbekistan a third irrigation was made for 67.8 per cent. of the plan; a fourth for 36 per cent. and a fifth for 15 per cent. of the plan: fertilizers were used this year in this district over an area of 432,400 acres.

Cotton sowing began ten days earlier than last year, and was approaching completion in the second decade of May. The area sown up to May 10 was 4,843,000 acres, or 97 per cent. of the plan against 4,552,000 (95 per cent.) a year ago. The corresponding percentages in 1934 and 1933 were 88 per cent. and 78 per cent. respectively.

Weather was predominantly dry and very hot during August and the first few days of September in the Central Asian Republics. Cotton picking had already begun in the greater part of the irrigated regions, and also in some parts of the non-irrigated at the beginning of September. Up to 5th September, 33,760 metric tons of unginned cotton had been acquired.

Harvesting in Uzbekistan, the chief cotton area, is five to six days late owing to the torrential rains of the second half of August, which impeded the ripening of the bolls. Owing to the improved cultural methods introduced this year, a good harvest is expected.

(International Institute of Agriculture.)

The 1936 cotton-sowing plan of Soviet Russia provides for an acreage of 4,979,000 acres, compared with 4,821,000 acres in 1935. The production plan calls for a total domestic crop of 3,024,000 bales of 478 lbs. each for ginned cotton, which would mean an increase of about 20 per cent. over the preliminary estimates for last year.

The Chinese Cotton Crop.

The following article is extracted from a recent issue of the *North China Daily News*:—

A significant indication of the developing tendency in China towards self-sufficiency in the production of commodities for industrial purposes may be read in the announcement of the United States Department of Agriculture that the cotton crop in China this year is likely to reach record proportions and that exports may total 400,000 bales. This is confirmed in Chinese cotton circles which anticipate that imports from abroad will be reduced to a lower level than ever before owing to the bumper crop and the price

differential which favours domestically-produced cotton. Favoured by good weather and the absence of drought and floods in the cotton-growing provinces, of which Shantung was the worst affected last year when approximately a third of the planted area had to be abandoned, it is estimated that this year's production is likely to be 70 per cent. higher than last year. Hupeh, one of the principal cotton provinces, is credited with an excellent harvest and in other provinces including Hopei, Kiangsu, Shansi, Shantung, Hunan, Shensi, Chekiang, Anhwei and Kiangsi anticipations are proportionately high. Last year's yield, according to the Chinese Cotton Statistics Association, barely exceeded five million quintals, a decrease of 26 per cent. on the production for the previous year owing to the intervention of natural forces which prevented fruition, but with more favourable conditions this year and an increasing feeling of stability and confidence prevailing in the rural districts leading to a larger acreage being planted, it is estimated that the season's crop might be as high as eight million quintals. This is a quantity of such proportions that the point of self-sufficiency, with the exception of the longer staples needed from abroad, is brought immeasurably nearer and should have a marked influence on world cotton statistics.

Within the last half-century, China has been alternately transformed from a cotton exporting country to a cotton importing country, and back to a cotton exporting country again, despite the development of the mill industry absorbing huge supplies of the domestic product. Coinciding with the output of Chinese and foreign mills with an increasing standard of production has been a decline in both the importation of raw cotton and cotton goods. Up to the year 1930, cotton goods headed the list of China's imports and that year represented a total value of \$223,400,000. Then followed a swift decline until last year the total was only \$27,700,000. As far as raw cotton from abroad is concerned, from a total of 2,800,000 quintals in 1931, which was a peak year and for the first time raw cotton superseded cotton goods as China's principal article of import, the figure fell last year to barely half a million quintals. China's developing mill industry and its capacity to meet domestic demands to the exclusion of either imported raw or manufactured products were not solely responsible for this remarkable change. Several factors contributed, including the reduced buying power of the people owing to general depression which compelled resort to cheaper and lower quality goods, political conditions and the financial crisis which the cotton mill industry experienced but which has since been alleviated by a series of measures initiated by private and Government efforts. But it is undeniable that the remarkable strides made in manufacturing and growing in this country have materially assisted in effecting this change so graphically illustrated in Customs statistics.

While the future of the industry as a whole is a problem in another category in view of the steady expansion of Japanese mill interests with their greater financial resources and strong competitive potentialities, the increased crop is an encouraging sign of natural recovery and represents the result of organized planning and directed development of a national asset. Improvement of quality and increase in quantity are not a new departure in China.

They are a process of some years. The first attempts were made in 1898 when Chang Chih-tung, Viceroy of Hupeh, imported seed from the United States. Since then a higher standard has been fostered by Government and private enterprise, and especially in educational institutions specializing in agricultural work. Since the establishment of the National Government greater emphasis has been placed on this important national resource and the creation of the National Economic Council in 1931, enjoying the advantage of an increasing stability of political conditions throughout the country, has provided additional facilities. In 1933, the Cotton Industry Commission was formed under the auspices of the Council with the broad powers of applying State planning to an unorganized industry. The Commission's efforts have been largely concentrated on the improvement of cotton cultivation which is the essential step before further reconstruction measures might be introduced. A longer staple variety is being produced rendering China less dependent on foreign supplies, and the progress made to increase production with a large exportable balance is demonstrated by the record crop anticipated this year bringing prosperity to rural areas which have suffered a long period of distress.

Cotton Cultivation in Greece.

The cultivation of cotton in Greece has considerably expanded in the last few years, the area devoted to it having increased from 50,000 acres in 1930 to 175,000 in 1936. This to an extent is undoubtedly due to the efforts exerted in that direction by the Cotton Institute but the main stimulus to the propagation of cotton cultivation has been the remunerative price that cultivators were able to realize in the local market for their cotton in the last few seasons as a result of the measures adopted by the Administration in restricting the import of foreign cotton.

Cotton now is more or less grown in all parts of the country the main centres of cultivation being the districts of Levadia and Lamia in the Greek mainland, Serres and Salonica in Macedonia, and that of Gythion and Kalamas in the Peloponnesus. The cotton raised is both rain-grown as also irrigated in a proportion of about 65 per cent. of the first and 35 per cent. of the second, the average yield of seed cotton per acre being 350 lbs. for the rain-grown and 800 lbs. and over for that under irrigation.

Figures of the Cotton Institute relating to this season's Greek cotton crop give the estimated production of lint very near 23,000,000 kilos, a quantity which, if realized, will not only suffice to cover the requirements of the local spinning industry but will also leave a surplus for export. It may safely be said that should the extension of cotton cultivation continue with the same intensity as at present, particularly so in the drained-off lakes and marshy lands of Macedonia, Greece will in a few years be in a position to export appreciable quantities of the fibre.

Parallel to the increase of cultivation, attention was also paid

to the amelioration of the lint by the introduction of improved varieties of American seed. The adoption of some of these and particularly those of the Accala, Ingold and Mexican Big Boll varieties have given excellent results both as regards the improvement of the fibre produced and the yield of lint that now often exceeds the 500 lbs. per acre for cotton raised by irrigation.

Rain-grown cotton has a staple length varying from $\frac{3}{8}$ ins. to $1\frac{1}{8}$ ins., is of sound white colour, fairly free from foreign matter, has a strong even fibre and can be used for the spinning of counts up to about 24's.

Irrigated cotton has on an average a fibre of 1 in. but samples up to $1\frac{1}{8}$ ins. are not rare. It is a remarkably strong cotton, white, soft, not very even, with a considerable amount of leaf when originating from districts where picking is carried out in an indifferent way contrary to that picked from places where the gathering is carefully made. Counts up to 40's are easily spun from it and even higher numbers could be produced from some of the longer staple cottons.

The seed cotton is all ginned on the saw gin, this type of machine, although ruinous to long staple cotton, being preferred on account of its large production, ginning machinery with few exceptions, is of American or local make most of it being obsolete and not in good condition.

The bales are not hard pressed as a rule their density being about 19 to 20 lbs. per cubic foot and their gross weight around 565 lbs. An 8-oz. Hessian cloth is used for covering and they are fastened round with 5 wires.

It may be of interest to note that the largest individual cotton cultivator in Greece is an English concern, the Lake Copais Company Ltd., who are the owners of a fertile estate of about 50,000 acres formed by the drainage of the "Copais" lake situated in the province of Boeotia. The crop annually raised by the Company on its estate exceeds in value £400,000 and besides wheat and other cereals it devotes over 15,000 acres to the growing of cotton, a part of which it cultivates by its own mechanical means and the rest being farmed out to tenants.

The Lake Copais Company was the pioneer in the work of scientific cultivation of the cotton plant in Greece as also in that of introducing improved varieties of American cotton seed for propagation, and has last year, at a large expense, established the first model ginnery in the country.

The equipment of the ginnery is of the most up-to-date type consisting of two double seed cotton openers, a full pneumatic battery of four Murray air blast saw gins made by Messrs. Platt Bros. & Co., Ltd., of Oldham, and a 300-ton hydraulic press with two press boxes and trampers all driven electrically as also a Simon heater for the disinfection of the cotton-seed intended for planting. The machinery is housed in a central building flanked by large separate warehouses for the seed cotton, cotton-seed and bales of cotton, all the buildings standing in a wide enclosure.

The cotton produced on the estate is all irrigated cotton raised from seed of some of the best American varieties such as Ingold, Mexican Big Boll, etc., imported direct by the Company from the U.S.A.

Careful picking and good ginning make of the cotton raised by the "Lake Copais" some of the best-grown in Greece commanding, usually, a higher price than other similar growths.

The bales are pressed to a density of 30 lbs. to the cubic foot, are of a weight of about 450 lbs. and measure $1 \times 0.68 \times 0.60$ metres. They are covered with strong Hessian cloth and have 7 wires round.



Bales of Greek Cotton.

The three bales on the right are three usual bales of Greek cotton; the three on the left are produced by the Lake Copais Company.

COTTON GROWING IN ABYSSINIA.

It is reported that an organization under the style of the Abyssinian Cotton Company has just been formed as a result of an agreement between the Italian Cotton Institute and the Federation of the Italian Cotton Industry.

The registered office of the company is at Addis Ababa, and its capital is 2,000,000 lire, power being reserved to increase this to 20,000,000 lire. The object of the new company is to grow cotton in Abyssinia and thus to help Italy to become independent of foreign supplies.

It will be the company's business to make investigations and experiments in order to make cotton-growing as profitable as possible, to discover the best uses for Abyssinian cotton, and to organize cotton-growing enterprises.

HARAR REGION FAVOURED.

Abyssinia is known to have some potentialities as a cotton-growing country, and cotton plants grow wild in some districts, but commercial cultivation has not yet been undertaken on any considerable scale. The Harar region is generally considered likely to prove one of the most suitable districts for cotton cultivation, though the Abyssinians themselves never showed much inclination to consider the possibilities.

SEA ISLAND COTTON.

"We are pleased to report that for the year ended July 31, a satisfactory business has been done in Sea Island cotton at improved prices," state *Molyneux Taylor & Co.*, of Liverpool, in their annual review of the market.

"The stock of West Indian cotton returned by the Liverpool Cotton Association in August, 1935, was 3,210 bales," they continue, "but as this included all West Indian growths, it was very little guide to the quantity of Sea Island cotton actually available, although we are aware that the stocks were considerably lower than those ruling for some years past.

"With improved demand, prices gradually improved, and available stocks were fairly quickly reduced at prices commencing at 16d. per pound, which rose gradually to as high as 22d. The latter price was obtainable owing to scarcity of supplies at that particular moment, and buyers felt that such a price was rather above the parity of the market. At the same time the trade have been persistent buyers at from 18d. to 20d.

"It is evident that Sea Island cotton is meeting a wider market, largely for English spinners, and a factor which has contributed to some extent to this improved demand has been the advertising campaign which has taken place for Sea Island goods. One or two large distributors have made a speciality of goods manufactured from Sea Island cotton. In addition a recognized trade mark has been registered, the use of which has given reputable firms the opportunity of specially marking their goods, and will have the tendency of cutting out competition from inferior articles.

"Another important factor is that manufacturers have been prepared to market their goods at a reasonable price, which is largely competitive, and has therefore widened the outlet for these particular goods. This cheap marketing has to a certain extent limited the price which spinners can pay for the raw material, but as far as we can see at the moment 18d. to 20d. according to quality, should be obtainable, which price should be satisfactory to producers. Actually when taken into comparison with ruling prices of Egyptian Sakel cotton, present prices obtainable for Sea Island cotton look very satisfactory.

"The prospects for the present season appear hopeful. Early arrivals have been sold at satisfactory prices, and stocks here are low. Provided producers are satisfied with prices at present available, there should not be much difficulty in disposing of consignments soon after arrival, and it would appear that if cotton is not held for excessive prices, a regular market is definitely established for Sea Island cotton.

"Owing to the efforts of the Agricultural Department in the West Indies, the class of seed used in the various islands has been more regular, and has resulted in improved shipments coming forward.

"There has been a definite improvement in the quality of cotton coming from Antigua, Anguilla and Nevis. St. Kitts cotton has varied during the last season or two, but we are glad to again report that an improvement is now noticeable in their shipments. Montserrat cotton, which is the most important crop, whilst not as long in staple as formerly, is very regular, and as a rule finds an easy market.

COTTON GROWING IN THE BRITISH EMPIRE.

Table prepared by the British Cotton Growing Association.

Approximate estimate of cotton grown in new fields in the British Empire (bales of 400 lbs). :-

	1929	1930	1931	1932	1933	1934	1935
Gold Coast	150	200
Nigeria :							
Southern Provinces	7,200	4,600	1,300	900	3,100	5,700
Northern Provinces	23,500	14,400	5,500	22,800	24,900	53,300
West Africa	30,800	19,200	7,000	26,200	28,150	59,200
Uganda Protectorate	204,000*	200,000*	207,400*	294,900*	285,700*	253,300*
Kenya Colony	2,000	900*	1,700*	3,100*	6,000*	7,100*
Tanganyika Territory	29,500	10,600	16,500	28,500	38,000	57,600
Nyasaland	6,100	4,200	5,100	6,100	10,400*	20,500*
Union of South Africa and The Rhodesias	10,200	10,200	3,500	2,200	3,200	3,600
East, Central and South Africa	251,800	226,100	234,200	334,800	343,300	342,100
Sudan	170,000	128,500	248,500	138,200	156,500	272,300
West Indies	5,500	5,100	3,700	2,600	3,650	4,700
Australia	6,000	10,500	5,000	13,900	22,000	17,700
Fiji	300	400	100	100	100	100
Sundries	3,500	4,500	3,500	3,000	2,000	3,000
Total	467,900	394,200	502,000	518,800	555,700	699,100
Approximate value	£11,187,900	£7,422,800	£4,304,600	£5,796,200	£6,536,800	£7,583,500	£9,520,100

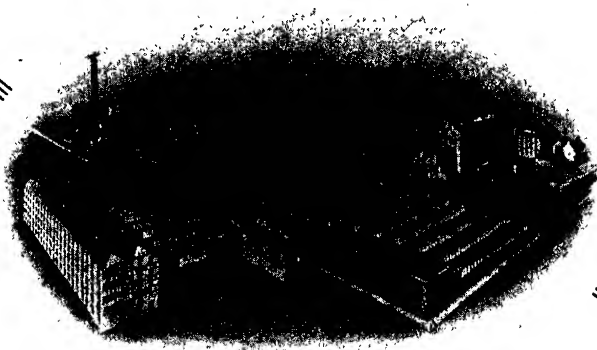
In addition there has been a production of improved long-stapled cotton in the Punjab and Sind during the 1934-35 season of 484,000 bales.

* Denotes exports.

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GOVERNMENT OCTOBER CROP AND GINNING REPORTS

The October report on the American cotton crop issued by the Crop Reporting Board shows that the average condition on October 1 was 61.8, against 59.1 a month ago, 64.5 on October 1 last year, 53.8 in 1934, and a ten-year average of 58.9. The average yield per acre is estimated at 186.9 lbs., against 179.2 lbs. in the last report and 191.5 lbs. at the corresponding date last year. The indicated production is 11,609,000 bales, which compared with 11,121,000 bales estimated in the September report and actual crops of 10,638,000 bales and 9,636,000 bales for the two preceding seasons. The crop in Lower California, which is not included in the United States total, is estimated at 72,000 bales, against 72,000 bales harvested last year.

The following table gives details of production by States with comparisons (in thousands of bales):—

	1936		1935	1934
	Oct. 1	Sept. 1	crop	crop
Virginia	31	29	30	36
North Carolina ..	576	556	572	638
South Carolina ..	763	705	744	678
Georgia	1,068	982	1,059	961
Florida	30	30	31	28
Missouri	240	204	177	238
Tennessee	401	381	317	405
Alabama	1,120	1,093	1,059	955
Mississippi	1,750	1,601	1,259	1,141
Louisiana	711	656	556	480
Texas	2,915	3,036	2,956	2,402
Oklahoma	239	239	567	321
Arkansas	1,070	917	853	869
New Mexico	100	100	75	90
Arizona	160	154	135	117
California	423	427	230	259
Other States	12	11	9	18
Total	11,609	11,121	10,638	9,636

BUREAU COMMENTS.

The Crop Reporting Board, in a supplementary report, states that prospects in Texas during the past month declined, but this was more than offset by the improvement elsewhere. The drought, which affected the crop in all States from Mississippi westward, was broken in September. The rains came too late to help materially the crop in Texas and Oklahoma, but that in the States adjoining the Mississippi River greatly improved. The rains in these States stopped premature opening, resulting in an increase in prospective yields, while continued improvements occurred in the eastern part of the Belt, where the plants made rapid progress. However, the crop is subject to damage by early frosts, and as bolls have opened rapidly there is at present an amount of cotton larger than usual exposed to possible loss from storms.

GINNING REPORT.

The U.S. Census Bureau reports that up to the close of business on September 30 a total of 6,031,000 bales of this year's cotton crop had been ginned. This compared with 4,232,000 bales to the same date last year and 4,962,000 bales two years ago. The amount ginned since the last report made up on September 15 is 2,324,000 bales, against 1,016,000 bales in the same period last year and 1,838,000 bales in 1934. The total includes 72,000 round bales and 2,000 bales American-Egyptian, against 34,000 round bales and 2,000 bales American-Egyptian in the corresponding report last year.

The following table gives details of ginnings with comparisons:—

	1936	1935	1934
Alabama	714,000	630,923	508,482
Arizona	31,000	16,714	25,659
Arkansas	630,000	246,483	452,971
California	55,000	9,076	79,862
Florida	23,000	22,464	16,824
Georgia	646,000	675,505	521,029
Louisiana	546,000	365,524	339,944
Mississippi	1,179,000	742,665	636,053
Missouri	131,000	26,755	36,269
New Mexico	10,000	1,550	29,576
North Carolina	119,000	101,729	74,652
Oklahoma	115,000	23,124	129,712
South Carolina	279,000	320,520	200,491
Tennessee	148,000	59,251	135,348
Texas	1,396,000	927,989	1,720,630
Virginia	4,000	838	1,035
Other States	5,000	958	3,847
Total	<u>6,031,000</u>	<u>4,232,068</u>	<u>4,962,384</u>

GRADE AND STAPLE—U.S.A. CARRY-OVER.

The carry-over of all kinds of cotton in America totalled, according to the United States Department of Agriculture, 5,409,400 bales on July 31, 1936, as against 7,208,500 on the same

date of last year. The total number of bales of tenderable cotton amounted to 4,406,100, or 82 per cent. of the total carry-over.

We give below the summary as issued by the United States Department of Agriculture on October 5:—

	1936		1935	
	Bales	Per cent.	Bales	Per cent.
Total carry-over	5,409,400	100.0	7,208,500	100.0
Total American upland	5,329,500	98.5	7,128,900	98.9
Total American-Egyptian	7,000	.1	8,600	.1
Total foreign grown	72,900	1.4	71,000	1.0

Grade (American upland)—

White and Extra White :

Middling and above	3,088,700	58.0	4,528,800	63.5
Strict low and low middling	1,109,100	20.8	1,465,900	20.6
Below low middling	95,100	1.8	56,700	.8
Spotted and yellow tinged	1,003,100	18.8	1,039,300	14.6
Light yellow stained, yellow stained, grey, blue stained	7,000	.1	6,800	.1
No grade	26,500	.5	31,400	.4

Staple (American upland) (inches) :

Shorter than $\frac{7}{8}$	557,500	10.5	528,800	7.4
$\frac{7}{8}$ and $\frac{3}{4}$	2,272,300	42.6	2,773,600	38.9
$\frac{3}{4}$ and $\frac{1}{2}$	1,244,000	23.3	1,799,500	25.2
1 and $1\frac{1}{8}$	711,100	13.4	996,200	14.0
$1\frac{1}{8}$ and $1\frac{1}{4}$	242,300	4.6	533,100	7.5
$1\frac{1}{4}$ and longer	302,300	5.6	497,700	7.0

Tenderability, Section 5, U.S. Cotton

Futures Act (American upland) :

Total tenderable	4,406,100	82.7	6,371,000	89.4
Tenderable, $\frac{7}{8}$ " to $1\frac{1}{8}$ " incl.	3,875,000	72.7	5,357,800	75.2
Tenderable, over $1\frac{1}{8}$ "	531,100	10.0	1,103,200	14.2
Total untenderable	923,400	17.3	757,900	10.6
Untenderable in grade only	365,900	6.8	229,100	3.2
Untenderable in staple only	500,100	9.4	490,900	6.9
Untenderable in both grade and staple	57,400	1.1	37,900	.5

(Estimated from data obtained from the classification of samples representing American and Foreign cotton held in storage in public warehouses, consuming establishments, and on farms, classed according to official cotton standards of the United States.)

The present American cotton crop, according to the classification made by the U.S. Department of Agriculture at various cotton gins throughout the Cotton Belt, show that 5.3 per cent. of the crop harvested to October 1 has been found to be $\frac{7}{8}$ in. in staple or shorter, compared with 10.2 per cent. up to the same date of 1935.

Cotton ranging from $\frac{7}{8}$ in. to $\frac{31}{32}$ in. in staple constitutes 49.1 per cent. of all the cotton classed so far from this season's ginnings, whereas cotton ranging from 1 in. to $1\frac{3}{8}$ ins. and cotton $1\frac{1}{8}$ ins. and longer in staple constitutes 35.6 per cent. and 10 per cent. respectively of all that has been classed to date.

False Packed, Plated, and Two-Sided Bales.

A RECENT publication entitled "Sampling American Cotton," by Sam W. Martin, Associate Agricultural Economist, and Florence Cleaves, Junior Marketing Specialist of the Division of Cotton Marketing, U.S. Department of Agriculture, while dealing primarily with the question of sampling gives prominence to the questions of false-packed, plated, two-sided and mixed-packed bales. The percentage of two-sided bales of the whole crop is placed at 13.7 per cent. of the Texas crop at 18.3 per cent., and of the Mississippi crop at 14.2 per cent.

In contrast with sampling methods elsewhere, it appears to be the general practice in America to draw samples from the top and bottom of the bale (both sides). Should any difference between the two sides be found, the bale is sold on the low side of the bale (or short side if in case of shorter staple).

We extract below interesting points from this publication:—

FACTORS AFFECTING REPRESENTATIVENESS OF SAMPLE.

The consideration of first importance in sampling cotton is that the sample be adequately representative of the bale. A good sample will enable the classer to determine the quality of the major portion of the lint making up the bale and to determine also whether the bale is plated or two-sided. Inasmuch as there is some confusion of the terms plated, false-packed, mixed-packed, and two-sided as applied to bales of cotton, a brief explanation of each of these terms, as used throughout this discussion, seems advisable.

A *plated bale* is one having a thin layer of lint on the top and/or bottom surface. This layer may be (1) of different quality or (2) of different origin, whether or not it differs in quality. The term "plated" is usually applied when this surface layer is not too thick to be penetrated in taking the sample. A *falsely-packed bale* is one (1) containing substances entirely foreign to cotton; (2) containing damaged cotton in the interior with or without any indication of such damage upon the exterior; (3) composed of good cotton upon the exterior and decidedly inferior cotton in the interior in such manner as not to be detected by customary examination; or (4) containing pickings or linters worked into the bale. An augur is sometimes used for boring into the end of a bale that is suspected of being falsely-packed. According to the present regulations under the U.S. Cotton Futures Act (May, 1936), a *mixed-packed bale* is one which in the samples drawn therefrom (1) shows a difference of two grades or more, if of the same colour; or (2), if of the same grade but of different colours, is blue-stained and either white, spotted, yellow-tinged, light stained, or yellow-stained, or which, if none is blue-stained, shows a difference of

two or more colour gradations; or (3) if the samples are of different grade and different colour, and show a variation in quality exceeding that between one grade in one colour and the next higher or lower grade in the next higher or lower colour; or (4) shows a difference in length of staple exceeding $\frac{1}{16}$ in.* A *two-sided bale* is one having on its top and/or bottom surface lint that differs in quality in any noticeable quantity. Certain two-sided bales may be plated and others may be mixed packed within the above definitions. Still other two-sided bales may not come within the definition for either plated or mixed-packed bales.

GINNING AND BALING.

The degree to which the sample represents the bale depends, first, on the uniformity in quality of seed cotton brought to the gin by the grower, and, second, on the thoroughness with which the cotton is mixed while it is being unloaded and carried through the cleaning and ginning equipment. At some gins an employee handles the suction pipe and unloads the seed cotton in such a way as to get a good mixture. At other gins the person handling the suction pipe may not be so experienced, in which case a good mixture may not be obtained.

Lack of uniformity in seed cotton when presented for ginning may result from one or more of a number of causes, among which may be mentioned the following: (1) Rain may have come while the cotton making up the bale was being picked, so that cotton picked after the rain would produce lint of lower grade than that picked before the rain. (2) The farmer may have been growing two varieties of cotton on his farm, and, not having a sufficient quantity of the pickings of one variety to make a bale, may have included enough of the other variety to make up the required load of seed cotton. (3) The ginner may have bought up various lots of seed cotton and stored them in the gin house or elsewhere until such time as he could conveniently gin the accumulated lot, too little care being taken to keep the different grades and staples separated. Occasionally a portion of this cotton may have been picked and other portions may have been harvested by snapping or sledding. Mixed-packed bales or plated bales may be the result.

When a load of seed cotton that varies in quality is presented for ginning, the ginner can do little more than mix the cotton thoroughly. Unless this is done, a two-sided bale is almost certain to result. The classification of samples from such a bale will probably vary with the position on the bale from which the samples are drawn.

Another ginning factor of importance in connection with obtaining a representative sample is the seed cotton from the last load remaining in the distributor, cleaner-feeders, and roll box when

* The regulations in effect in May, 1936, declare bales showing within themselves a difference of staple exceeding $\frac{1}{16}$ th inch to be mixed-packed. At that time, however, a revision of this definition was under consideration, and interested persons would do well to inform themselves of any change that may have since been made in the regulations.

the press box is turned to receive the cotton for the next bale to be ginned. Some ginners claim that it wastes much time and machine power to let the rolls run until they stop turning, and that, since the press box is turned at the same time on each bale, no loss in pounds of lint is suffered by the farmer. However, if all the seed cotton has not been ginned and passed into the press box before the press box is turned, this cotton will form a layer on the bottom of the following bale, the lint of which may or may not differ materially from the remainder of the lint that makes up that bale.

If this layer is of either better or poorer quality than the average for cotton in the bale, it may prevent the drawing of a representative sample and thus affect the classification of the bale. It should be borne in mind that the commercial sample used in cotton classing is, in reality, composed of two samples, one from the bottom side and one from the top side of the bale, and that it is customary to buy cotton on the basis of that portion of the combined sample that is lowest in grade and staple. In spite of the fact that plates on the bales of cotton are often so thin as to be recognized by the classer as of minor importance, it should be remembered that when a layer of inferior cotton is placed on a good bale, an injustice is done the farmer who grew the cotton.

The thickness of the plate on a bale of ginned lint depends on several factors, among which are the size of the gin, the type of ginning machinery, the variety of cotton, and the quantity of cotton left in the machinery when the press is turned.

Mr. F. L. Gerdes, associate cotton technologist in charge of the cotton fibre research work at the Department's ginning laboratory at Stoneville, Miss., found that if the press box is not turned promptly, but instead the saws are allowed to run until the seed roll stops turning, more or less short fibrous material is deposited on the top side of the bale. The quantity of this fibrous material deposited will depend also upon the variety of the cotton and the size of the gin.* Mr. Gerdes found that this deposit contains linter fibre ginned from the seed from the time the feeding supply is exhausted to the time the roll stops turning, and that it is often considerably discoloured, especially if the cotton being ginned is of a variety having big, fuzzy seed.

Ordinarily this deposit is too thin to affect the grade or staple of the bale unless the sample is not sufficiently trimmed.

Another cause of plating on the top side of bales is the re-cleaning of seed cotton. Certain types of gins have an overflow of seed cotton from the distributor. Later, this cotton is passed through the overflow suction pipe to the cleaning machinery, is re-cleaned, and is again presented to the distributor. If the gin stands are still too crowded to take all of the cotton presented, the distributor throws the excess to the overflow pile, and the cleaning process is repeated. Should the operation of the overflow system cause seed cotton to pass through the cleaning equipment two or more times, a plate of different quality would probably be deposited on the top of the bale.

* The number of gin stands and saws varies from one stand and 60 saws to six stands and 80 saws; other things being equal, the smaller the gin, the thinner the layer of fibrous material.



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Ginning also affects the thickness of the plate in another way : the plate may not be of uniform depth. It may be thick at one end of the bale and thin on the other end, or it may be thick in the centre of the bale and thin on the ends. Charles A. Bennett, senior mechanical engineer in charge of engineering work at the Department's experimental cotton ginning laboratory at Stoneville, Miss., states that uneven distribution of fibres in a plate or a bale may be caused by an unequal rate of feed into the different gin stands, unbalanced action of brushes or air-blast nozzles that deliver the ginned fibre from the gin stands, or a combination of these two causes. To quote Mr. Bennett, "Standard construction of the lint flues in gins introduces the fibre from each gin stand to the main lint flue in such a manner as to give a spiralized or twisting delivery of the lint to the condenser. This delivery, acting like a thread on a screw, will discharge lint from any particular gin to a certain position on the condenser screen; consequently, the failure of all the units to deliver lint uniformly and in equal quantities will result in the bat being thicker at one place than another, and as the bale is built up, more fibre accumulates in the corresponding position within the press box. If one stand is not fed at the same rate as that for other stands, or if the doffing action of the brushes or air-blast nozzles produces a greater velocity of discharge from one gin stand than from another, it will be seen that it becomes possible for the bat to be thinned out in one place and thickened in others."

Since a bale packed in this way is not of uniform density, and since this lack of uniformity affects the top layer of fibrous material as well as the underlying cotton, it is possible for a sample to be drawn at a point on the bale where this layer is likely to be thick and another sample to be drawn through a thin portion of the layer at a different position on the bale. This may result in differences in classifications for the same bale, due to actual quality differences in the samples drawn.

In some cases, the ginner avoids placing the plate on the bottom of the bale by turning the press box one-fourth of the way around. As the ginning of the new bale is started, the lint from the previous bale that was left in the roll box is allowed to fall to the floor. After a part of the lint from the new bale is ginned into the press box, the lint from the previous bale is thrown into the centre of the bale, and the ginning continues. This is a violation of law in some States and so far as known is not a general practice elsewhere.†

Developments in the mechanical design of gin machinery that would obviate the plating of bales would be of great value. Not only would it increase the representativeness of samples, but it would remove one of the factors that frequently affects the classification of the grower's cotton.

Cotton buyers in different parts of the Cotton Belt were interviewed in an effort to obtain information concerning the prevalence

† A mechanical device has been invented for catching the first part of the lint for each bale, allowing the next lint ginned to fall into the press box. The first lint ginned is then deposited into the press box, and the bale is completed.

of two-sided bales of cotton marketed in the territories in which they operated. Cotton buyers of all types were included, some of them being among the largest buyers of cotton in the United States, and some being only small country merchants. Since it is not known how much cotton was handled by each buyer, or how much cotton was grown in the territory in which each operated, there is no satisfactory method of weighting the information given by these buyers concerning two-sided bales.

Unweighted averages of the estimates were computed, therefore, for the various States, and they are presented in tabulation as an indication of the prevalence of two-sided bales. Inasmuch as two-sided bales are valued for grade according to the "low" side and for staple according to the "short" side, it can be seen that losses thus sustained by farmers alone in the United States amount to thousands of dollars during each season.

Bales of cotton the two sides of which vary $\frac{1}{8}$ in. or more in staple length are not desired by many spinners even at a price representing the value of the shortest staple length. Unless the rolls on a spinning frame are reset, cockled yarn is likely to result from the spinning of cotton that averages longer in staple than that for which roll settings have been made. Bales that are two-sided in grade can be used at some mills, but spinners often reject them.

Another matter connected with ginning that should have attention because it affects the sampling of cotton, is the roughly packed top side of the bale. It is common knowledge among cotton samplers who work at compresses that it is easier to get a sample of desirable size from the bottom side of the bale than from the top side. The first cotton that falls into the press box forms the bottom of the bale. The sample from the bottom of the bale does not break into parts as does the sample from the top side. In other words, the sample from the bottom of the bale will usually open into layers, which in most instances are the length of the sample; whereas the sample from the top of the bale will not open into layers so readily, and often has a rough, wadded appearance. This roughness is not of the same intensity in all samples, but few samples from the top of the bale are so rough that the grade assigned is lower than it otherwise would have been, or that, in trade terms, the grade is reduced. An extreme case of roughness in packing gives the sample drawn from the top of the bale the appearance of loose cotton. If the sample is trimmed rather deeply, however, this is not so noticeable, especially if the last layers of cotton distributed to the bale were folded smoothly. The layers of cotton in the sample from the top side of the bale are not so long, as a rule, as those in the sample from the bottom side of the bale. The shorter layers and the greater roughness are two useful indicators of the top side of the bale. Notwithstanding the rough appearance that is sometimes noticeable in the sample from the top side of the bale, it is usually the more representative of the two portions of the sample. It is of the same origin, presumably, as the major portion of the cotton in the bale, for the bottom of the bale may be plated with cotton of different quality from the load of seed cotton previously ginned.

ESTIMATED PERCENTAGES OF TWO-SIDED BALES AMONG COTTON
BALES HANDLED BY BUYERS INTERVIEWED IN SPECIFIED STATES,
CROP OF 1932-33

State						Buyers interviewed Number	Average percentage* of two-sided bales handled Per cent.
Total	..	..	..	..	..	161	12.7
Alabama	..	..	..	..	..	11	11.8
Arkansas	..	..	..	..	..	15	15.3
Georgia	..	..	..	..	..	19	7.2
Louisiana	..	..	..	..	..	8	↑
Mississippi	..	..	..	..	..	9	14.2
Missouri	..	..	..	..	..	2	17.5
North Carolina	..	..	..	..	..	11	13.9
South Carolina	..	..	..	..	..	13	12.7
Tennessee	..	..	..	..	..	6	4.4
Texas	..	..	..	..	..	64	18.3
Virginia	..	..	..	..	..	3	11.8

* Unweighted average of buyers' estimates.

↑ No data.

Gin-manufacturing companies and ginnerers vary in their opinions as to the cause of the rough top side of a bale. Some manufacturers of gin machinery state that when the top side is rough, the picker roll is not properly timed. Mr. Bennett gives the following explanation: "Frequently, during the final minutes in the ginning of a bale of cotton, the chutes leading to the feeders are irregularly filled and the seed cotton is not uniformly spread over the entire length of the stand. This results in dribbles of seed cotton feeding down on one side of the gin only, and consequently the saws are delinting one portion of the seed roll while ginning at a varied rate on the remainder. This action of itself may produce a severe roughness in the sample, and scanty accumulations of cotton in the condenser chute will result in accentuating this roughness when the doffers discharge the lint into the press box. If the ginner does not raise the gin breasts promptly when finishing the bale, the seed rolls are ginned down to different densities so that variable amounts of cotton remain in the seed-roll boxes, and very irregular plating may result on one side of the bale."

Extracts from State Laws Relating to False Packing of Cotton.

ALABAMA.—Laws relating to gins—General Acts of 1923—Act 376, Article 32, Section 12: "Any person who fraudulently packs, or bales, any cotton, by plating or otherwise, must, on conviction, be fined not less than fifty, nor more than five hundred dollars, and may also be imprisoned in the county jail, or sentenced to hard labour for the county, for not more than six months "

ARIZONA.—Revised Code of Arizona, 1928, Section 4823.—*"Increasing weight of goods sold in containers.* Every person who is putting up in any bag, bale, barrel, or other package, any hops, cotton, wool, grain, hay or other goods usually sold in same

by weight, puts in or conceals therein anything whatever, for the purpose of increasing the weight, with intent thereby to sell the goods therein, or to enable another to sell the same, for an increased weight, is punishable by a fine of not less than twenty-five dollars."

FLORIDA.—Compiled General Laws of Florida, 1927, Section 7856—" *False packing of provisions*. Whoever fraudulently puts into any barrel, bale of cotton, cask or other package of sugar, rice, or pork, or any other article of provisions, any dirt, rubbish, or other thing, shall be punished by fine not exceeding one thousand dollars."

GEORGIA.—Penal Code, Vol. 6, 1914, Section 709—" Any person who shall put or cause to be put into any bale of cotton, vessel of sugar, rice, pork, beef, or other provisions, wool, or other article, prepared for market, any dirt, rubbish, or other thing, for the purpose of adding to and increasing the weight or bulk of said cotton, sugar, rice, beef, pork, or other provisions or things, shall be deemed a common cheat, and shall be punished by a fine equal to the value of the thing thus fraudulently packed or put up, and imprisonment and labour in the penitentiary for not less than one year nor more than five years. The bare possession or ownership of such commodities, so fraudulently packed or put up, shall not of itself authorize a conviction, where sufficient evidence of knowledge or privity on the part of the owner, or the person in possession, may not be produced on the trial."

MISSISSIPPI.—Mississippi Code, 1930, Section 837—" If any person shall fraudulently pack or bale any cotton, he shall, on conviction thereof, be fined not more than five hundred dollars, or imprisoned in the county jail not more than six months, or both."

NEW MEXICO.—New Mexico Statutes, 1929, Section 81-205—" *Plating bales*. Each and every ginner and any officer, servant or employee of a corporation, person or gin company conducting the ginning business under the provisions of this Act, or any other person, persons or corporation who shall fraudulently, wilfully or knowingly 'plate' or pack a bale of cotton, which is to say, who shall wilfully and knowingly place on the outside of said bale a better grade and quality of cotton than on the inside of said bale or who shall gin cotton when it is wet or who shall in the process of ginning said bale of cotton or thereafter add water or any foreign substance to said cotton shall be guilty of an offence hereunder."

SOUTH CAROLINA.—Code of South Carolina, 1932, Section 1280—" *Fraudulent packing of cotton*. Any person or persons convicted of knowingly or wilfully packing into any bag or bale of cotton any stone, wood, trash, cotton, cotton-seed, water, or any matter or thing whatsoever, or causing the same to be done, with the intent and purpose of cheating or defrauding any person or persons whomsoever in the sale of such cotton, or who shall exhibit or offer for sale any bag or bale of cotton so fraudulently packed, at the time of the said exhibit, or offer for sale knowing the same to be so fraudulently packed, shall on conviction thereof, as

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aforesaid, be sentenced to pay a fine of not more than five hundred dollars nor less than twenty dollars and to be imprisoned for a term of not more than six months nor less than one month."

TENNESSEE.—Code of Tennessee, 1932, Section 11147—*"Penalty for concealing iron, stone, etc., in bales of cotton or packages of tobacco.* If the owner or superintendent of cotton gin or tobacco establishments of any kind shall place any wood, iron, rocks, dirt, or other substance, into any bale of cotton, hogshead or package of tobacco, when packed or baled, for the purpose of adding to the weight thereof, or shall cause the same to be done by others, such person so offending shall be deemed guilty of a felony, and, upon conviction thereof, shall suffer imprisonment in the penitentiary for a period not less than two nor more than five years, and shall also pay a fine of five hundred dollars."

TEXAS.—Complete Texas Statutes, 1928. Article 5672—*"Certificate of Guarantee.* Whether or not a sample of the bale of cotton so ginned shall be requested and taken by the ginner, the ginner shall, nevertheless, place with each bale of cotton ginned by him a certificate of guarantee under his bond that, during the process of ginning or thereafter, while the cotton was in the possession of the ginner, no water or foreign substance of any nature had been placed with such cotton, with intent to defraud. Such certificate shall bear the name and address of the person for whom the cotton was ginned, the number of the bale on the books of the ginner, and the weight of the bale at the gin."

A NEW COTTON PICKER.

As nearly as can be determined, the first attempt to develop a mechanical cotton picker was made in Memphis in 1850. Since that time some 820 patents have been taken out at the United States Patent Office for all kinds of cotton pickers—motor cotton pickers, pneumatic, flail or whip, strippers, comb, endless belts, rotary or oscillating spindles or drums, etc.

A short time ago the press gave extensive publicity to what was termed a "new mechanical cotton picker," i.e., the New Rust Cotton Picker, but the reader is referred to page 97 of the October, 1934, issue of the INTERNATIONAL COTTON BULLETIN, where a note on this same cotton picker will be found.

During August of this year working on what was declared to be ideal conditions, the cotton picker invented by the Rust brothers picked a bale of cotton in an hour and 15 minutes.

Mr. Oscar Johnston, director of the Federal Cotton Producers' Pool, declared the machine was still in the experimental stage. He said that trash picked up by the machine would not be separated by a gin and would lower the grade two cents a pound.

Mr. M. D. Rust, one of the two inventors, was in charge of the demonstration. The other brother, Mr. I. D. Rust, is in Russia, where he has sold two of the machines to the Soviets.

The machine was tried out on cotton that it was estimated will produce a bale to the acre. The cotton was almost all open. It

was necessary for the machine to go over each row of cotton twice. Observers estimated it picked 90 per cent. of the cotton, knocking the bolls that it failed to pick to the ground.

Mr. J. R. Otis, head of the Agricultural Department of Tuskegee Institute of Alabama, the largest negro college in the world, gave his verdict as follows:—

“The machine will have no effect economically or socially on the million Southern negroes who pick cotton by hand.”

Mr. Otis said if the machine “will enable American farmers to compete in world markets with other countries now increasing their productions, we welcome the innovation.”

Two men are required to operate the Rust machine. Working under ideal conditions it can pick 10 bales of cotton a day. The cotton must be practically all open for the machine to work with efficiency.

Federal officials watching the demonstration said they would make no comment until they could conduct a demonstration of their own.

The federal agricultural experts said they would make exhaustive tests of the machine.

The cotton picked is in a separate unit pulled by an ordinary tractor. A big bag on the side holds 400 lbs. of cotton. The machine goes down a row of cotton at the rate of three miles an hour. It must go down each row twice. The biggest drawback to the machine that observers saw was the fact that it picks up dead cotton leaves. Gin machinery will not take a high percentage of this out of the cotton.

American Cotton and Currency Devaluation

The views of a contributor to the *New York Journal of Commerce* are that the recent stabilization and devaluation of currencies in Europe will benefit American cotton. The article runs as follows:—

“The cotton industry generally expects to benefit in a very real way from the changes in the relationships of the world’s major currencies which have taken place in recent weeks. While minor upsets may occur in the course of this adjustment, it is generally felt in the industry that any approach to more stable currencies is certain to have favourable effects on world trade generally and that American cotton, which is the chief agricultural export of this country and which represents the bulk of cotton moving in the channels of international trade, will share in this expansion.

Emphasis was placed recently on this viewpoint in the trade by the action of the Treasury in making gold available for export to countries whose stabilization funds are working with that of this country in the direction of more satisfactory conditions. The new step was seen in the trade here as a substantial backing of the pre-

vious 'gentleman's agreement' between this country, England and France. Foreign interests were reported better buyers of cotton here than for some time, and prices were correspondingly strengthened

EXPORTS RISING.

In times of normal cotton crops the United States exports somewhat more than half its crop, the domestic industry taking the remainder. Cotton consumption in this country, unaffected in any material way by the currency developments, promises to be the mainstay of the market this season, but at the same time it is significant that American cotton exports have been forging ahead lately. The total crossed the 1,000,000-bale mark last week earlier than in the two previous seasons. Cotton exports were poor at the outset of the season, but improvement has been coincident with the promise of more stable currencies. Cotton shippers report that their foreign customers have been disposed to buy ahead more freely of late than was the case previously.

Devaluation of the franc has increased demand for American cotton from that quarter. French textiles, sagging all summer, have begun to recover, and since August 1 shipments of American cotton there have reached 137,000 bales, against 93,000 in the corresponding part of last season. Italy does not show up as well, for that country has been under close import restrictions, and has been encouraging the production at home of rayon staple fibre as a substitute for cotton. Reports yesterday that Italy was moving to scale down tariffs and lighten import restrictions gave the cotton trade hope that the market for cotton there might expand. Italian imports since August 1 are only 33,000 bales, against 64,000 a year ago.

The real significance of the currency developments, however, lies in the broader field of international trade generally. Here there are several factors to be weighed, particularly when foreign crops begin to move in volume after the turn of the year. The lower value of the pound sterling in terms of dollars and the maintenance of the rupee at previous parity with the pound would suggest the possibility that the Indian crop, second to that of this country, might be of interest to spinners in England and other countries allied with sterling in the last half of this season. The effects of reported linking of the milreis to the dollar instead of to the sterling could, however, have an offsetting effect, particularly with Brazilian, a closer competitor of American cotton than is Indian. Egyptian, tied to sterling, is, of course, a crop of staple cotton, and staple cotton is a relatively scarce item in nearly all quarters of the world to-day.

However, so long as sterling is maintained somewhere around the current rate, American shippers do not seem to fear for their export business as greatly as they did under the irregular exchange conditions of previous years. The issue of competition in this respect is something more than a matter of exchange rates; it is an issue of policy as to whether the United States is to continue to limit its cotton crops, or is to recognize that an expanding market for cotton exists in the world and that the biggest share of this will go to the largest producers.

U.S. CROP INSURANCE AND STORAGE EXPERIMENT.

According to a message from Reuter, the committee for the study of crop insurance met recently in New York. It was said that it will first investigate the problem of insurance of wheat, cotton and maize, and later that of tobacco, rice, sugar and peanuts. It was indicated, however, that the experiment, according to present plans, will first be actually undertaken with wheat and cotton. At the same time, Mr. Wallace, Secretary of Agriculture, conceded that control of production is essential to any form of crop insurance by the Government.

That the President has definitely scheduled the principle of crop insurance combined with a system of storage of reserves as his next agricultural experiment was evident from his appointment of two committees. One, to be headed by Mr. Wallace, Secretary of Agriculture, will study a recommendation for crop insurance legislation to be submitted to Congress, while the other will investigate the possibilities of improvement in the use of land in the Great Plains drought area.

American Cotton Crop Prospects.

The following report was published by the *New York Cotton Exchange Service* on October 6th:—

Advices from our crop correspondents as of the end of September indicate that during last month the condition of the crop was better maintained than is usual in September. The Carolinas did not show the decline which usually occurs in September, Georgia and Alabama held their condition well and perhaps showed a slight improvement, Mississippi, Tennessee, Louisiana, and Arkansas recorded appreciable gains, and Oklahoma perhaps gained a bit, while Texas showed only a moderate deterioration. For most States, the Department of Agriculture usually puts a slightly higher yield interpretation on condition as of October 1 than as of September 1, and, hence, if the Department finds that the changes in the condition of the crop during September have been as indicated above, it may make an appreciable increase in its crop estimate, unless it sees special reasons this year for interpreting condition in terms of lower yield.

In the Eastern and Central portions of the Belt, the outstanding feature of crop conditions and developments in September was the extremely favourable weather for the progress of late cotton in the former drought areas of the North-east and for the maturing and harvesting of cotton generally from Louisiana and Arkansas eastward. The general tenor of reports from the Eastern and Central Belts is that the crop is turning out fully as well as expected, and in numerous sections is exceeding expectations of a month ago. This is attributed to the fact that the growers have been able, in most sections, to keep the crop closely picked, as it has matured,

and so there has been a minimum of loss through bad weather, while the weather has helped to fill out late bolls, although an absence of top crop is reported from many sections. In the Eastern States there are numerous reports of destruction of foliage and late bolls by army worms, but it is not clear that these pests have reduced greatly the bolls that were set early enough to mature before frost. A modifying factor with reference to much of the Eastern crop is its extreme lateness and hence its vulnerability to early frost. First killing frosts normally occur in the North-eastern part of the Belt around November 1, and it is emphasized that a fair proportion of the yields of the Carolinas and Georgia will depend upon when they come this year. The Central Belt, with its crop unusually early, is largely free from risk of appreciable loss by frost.

In much of Texas and in Oklahoma, the first half of September brought a continuation of the devastating drought of August, and this was followed by about two weeks of heavy and almost continuous rains. This precipitation came too late to add much to the yield prospects in the late crop sections of the North-west, but it doubtless helped to fill out bolls to some extent, and its ultimate effect in that area will doubtless depend on the frost date. In West and South-west Texas the rains were so heavy that they caused the loss of several thousands of acres by the flooding of low lands, and generally in Central, Eastern, and Southern Texas, they beat off considerable cotton, and caused rotting of bolls, as well as stimulated insect damage. However, a large percentage of the crop in South Central and Southern Texas—ranging in various areas from half to nearly all of the crop—was picked and ginned before the rains came, and so the damage by them was restricted. The past week has brought seven days of clear weather in practically all parts of Texas.

It would appear that the largest gains in yield prospects since the beginning of September have occurred in the Central Belt. The crop in the Valley States was unusually early during most of its development, and ideal weather since the end of August has permitted extremely rapid and very clean picking of the fields. The only handicap has been a shortage of pickers in some sections. Rains late in August apparently helped the crop in Arkansas and Mississippi, and these, together with the normally lower temperatures in September, appear to have checked the premature opening which brought such a sharp decline in condition from August 1 to September 1, especially in Arkansas. Whatever may be the reason, the fact is that our correspondents in the Valley States report increases in condition of 5 to 10 per cent. points from September 1 to October 1. It is doubtless on the basis of this improvement that estimates of the crop in the four major Valley States have been raised, in various trade quarters, by 200,000 to 300,000 bales.

There is a tendency in trade quarters to be conservative as to increasing expectations of yield in the Eastern States, because of uncertainty as to how much of the late cotton in that section will reach the open boll stage before frost. Trade observers are apparently of the belief that 100,000 to 200,000 bales could be added if the first killing frost should not come before the average date. Last year parts of North Carolina and Georgia had their first frost on October 7, but other parts of those States, and South

Carolina, did not have frosts heavy enough to stop plant growth until November 22 to November 24. As will thus be seen, it may be dangerous to raise crop ideas for these Eastern States greatly until it is seen when killing frost actually comes. The present tendency in trade quarters seems to be not to raise ideas of crop expectations in the East by much more than the probable decline in the West, leaving only a moderate net gain to be added to the increase of the prospect in the Central States.

It would appear from advices received from our correspondents that roughly half of the crop was ginned to October 1. If such proves to be the case, it will be found that this crop is being picked and ginned much earlier than usual, on an average, since the average percentage ginned to October 1 in the last five years is only 42 per cent. Ginnings would have been still further advanced had not Texas and Oklahoma had so much heavy rainfall during the last half of September. Ginnings were apparently at a fairly high rate during the last half of September for the Belt as a whole, notwithstanding the rains in the West. They probably were about in line with those in the corresponding periods last year and two years ago, when about 18 to 19 per cent. of the crop was ginned from the middle of September to the end of that month.

The apparent very large percentage of the crop ginned to the middle of September, as indicated by the Bureau of Census report on ginnings on September 16, may, it would seem, be explainable on the basis of two factors. First, there is the probability, now generally accepted, that the crop is somewhat larger than the Government estimate as of September 1. Secondly, according to reports from our correspondents, bale weights are running appreciably lighter than last year, at least in the Eastern and Western Belts. Our advices indicate that in the Eastern States bales ginned to date have averaged 7 lbs. to 10 lbs. lighter, in Texas 10 lbs. to 12 lbs. lighter, and in Oklahoma 15 lbs. to 20 lbs. lighter, than last year. It is to be noted that a difference of 10 lbs. in the average weight of ginned bales is equal to about 2 per cent. in converting running bales to 500-lb. bales or vice versa. This is equal to over 200,000 bales on an 11,000,000-bale crop.

The Present Position of American Cotton.

Dr. A. B. Cox, the well-known Texas economist, commenting on the current cotton situation, writes as follows in a recent issue of the *Texas Business Review*:—

“For the first time in over 100 years the United States is experiencing the disadvantages of a cotton-producing country which does not have sufficient production to dominate world prices. When the United States produced close to 60 per cent. of the world's cotton, a short crop in this country was compensated for by a corresponding rise in price. Now that the United States is

producing only about 40 per cent. of world cotton, a large part of that advantage has been lost and cotton growers may now experience all the disadvantages of widely fluctuating income resulting from a short crop and a comparatively low price at the same time.

" This year the United States has had a sharp reduction in supply without a corresponding rise in price. On August 8 the estimated crop in the United States was 12,461,000 bales, and the price of New Orleans middling spot cotton closed on that date at 12.42 cents. On September 8, the date of the last Government report, the estimate was reduced 1,361,000 bales to 11,100,000 bales. Moreover, the estimated world supply of American cotton as of September 1 was about 2,500,000 bales less than on September 1 last year, which should normally cause an advance in the price from then to now of about 350 points. On September 8, however, the price of New Orleans spot closed at 12.52 cents, only 10 points above the price a month earlier.

" There are a number of reasons which may be offered in explanation of this small advance in the price of American cotton in view of the large reduction in the estimate of the crop; but the fundamental ones are that foreign producers are now supplying more than enough cotton to make up for our reduced production, and, because of our tariffs, most foreign buyers either prefer or are forced to buy raw cotton from our competitors. War clouds in Europe are a drag on the market, but to date exports are ahead of last year. Best estimates now indicate another record-breaking foreign crop—this time of over 16,000,000 bales of commercial cotton. The significance of this figure is brought out by the facts that in 1931-32 foreign production was only 9,587,000 bales and the all time high prior to the depression was only 11,881,000 bales.

" Let us translate the world cotton situation into terms of income and spending power of Texas farmers. The September 8 estimate of Texas cotton production was 3,036,000 bales, which at present prices has a farm value of about \$170,000,000. Last year at this time the indicated farm value of the 3,467,000 bales forecasted for Texas was about \$175,000,000. The actual dollar income to Texas cotton growers from lint cotton last year was about \$160,000,000. The lowest dollar income from lint cotton in Texas during the depression was \$140,000,000 in 1932-33.

" The significance of the cotton situation in Texas is best shown by comparing these incomes with pre-depression incomes of Texas cotton growers. The average income to Texas cotton growers from lint cotton during the three calendar years prior to the depression was about \$417,000,000. A part of this decline of \$257,000,000, or about 60 per cent. in income from cotton has been offset to a small extent by Government subsidies to grow less cotton. In 1934 these subsidies to cotton growers amounted to \$34,000,000, a little over \$30,000,000 in 1935, and probably not to exceed \$25,000,000 this year.

" The buying power and debt-paying ability of farm income is the most fundamental consideration. Measured in terms of buying power of the dollar in 1926, the average value of lint cotton produced in Texas during the three pre-depression years was about \$434,000,000, the 1932-33 value about \$220,000,000, and the

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1935-36 value about \$200,000,000. When cotton benefit payments are added to the lint cotton income, the total buying power is raised to about \$238,000,000."

CROP PROSPECTS IN TEXAS.

The American Cotton Crop Service recently issued the following statement:—

The top crop outlook, which might add additional baleage to the 1936 prospect, appears to be very slim at the time this is being written. In South Texas, where abundant moisture in September usually favours top crop development, heavy insect infestations—especially the boll-weevil, point to little or no increase in baleage. In the northern half of the Western Belt it is now too late for the plant to grow new fruiting branches and set a new crop. In the southern half of the Central and Eastern Belts a few scattered top bolls may mature, but weevil and cotton leaf-worm are numerous in most fields and no important increase in the top crop is expected. Unless the frost date should come unusually late, there are no increase in the top crop prospects indicated in the northern half of the Central and Eastern Belts. The cotton leaf-worm is increasing rapidly and defoliation of the plants by this pest will serve to stop development of top bolls.

Attention is drawn to the effect of the recent heavy rainfall on the Texas crop. Late reports show that, in addition to beating out much open cotton, the excessive rainfall lowered the grade. Much of the Texas crop had already been seriously damaged by drought which caused premature opening and undersized bolls. Therefore, recent floods which beat much of the open cotton from the plants and stained the already extremely short lint just about completed the inferiority complex. Reports from the Central and Eastern Belts show average to above average staple and character.

Late reports from crop reporters in Texas call attention to recent floods as increasing the field loss and acreage abandonment. The rain-beaten cotton in many localities, especially scattered pickings, will probably not be harvested. In creek and river-bottom lands many cotton fields were inundated, and open cotton in the flooded fields will probably be a complete loss.

THE COTTON INSECT SITUATION.

Concerning the cotton insect situation, we quote a recent report by the U.S. Bureau of Entomology as follows: "Cotton boll-worm infestations, in general, are below normal throughout the Cotton Belt. This pest seems to be slightly on the increase in North and South Carolina, Alabama, parts of Mississippi, and parts of Texas. In Tennessee, North-Western Mississippi, Arkansas, Oklahoma, and in Central and Northern Texas, however, the boll-weevil is comparatively scarce, the infestations in Arkansas and Oklahoma being the lightest on record."

The above report has a bearing on the 1937 outlook in the Central and Western Belts. No doubt a much smaller number of weevils will enter winter quarters, and, in some of the former drought areas the pest will be almost exterminated.

CROP REPORTS.

Messrs. Weil Brothers, Montgomery, Alabama, in their semi-monthly crop letter dated October 2, 1936, state as follows:—

During the last half of September weather conditions have been favourable to the harvesting of the crop in the Eastern and Central Belts. Rainfall has been moderate with temperatures higher than normal. In these sections picking and ginning have made unusually rapid progress, with the movement general in both southern and northern territories. There is some shortage of labour, particularly in Mississippi, this being the exception rather than the rule. Damage from boll-weevil has been nil except in eastern portions of North and South Carolina, where they have appeared in considerable quantities. Leaf-worms have stripped the plant in many sections of all its foliage, thereby stopping any further growth and the maturing of small bolls. Grades in the northern sections average from Middling to Strict Middling, and in the southern sections about Middling—with no low grades at the present time. In Mississippi, including the Delta, high grades have predominated. The staple of the Eastern Belt crop is much superior to last year's, due to improved seed and favourable weather during the growing season.

In the West excessive rains have retarded the movement, and harvesting of the crop has probably been delayed from one to two weeks. This unfavourable weather has undoubtedly reduced the yield somewhat—mainly it has damaged the open cotton and lowered the grades. Weevil and leaf-worm have increased, taking much new growth and damaging the half-grown bolls. The chances are that the top crop in the West will be small.

Despite a rapid and free movement of cotton there has been an insistent and insatiable demand at a continuously advancing basis—both mill buyers and shippers being keen and aggressive bidders for offerings of all grades and staples. With their stocks of cotton at a low ebb American mills have been heavy buyers in increasing amounts for nearby and forward shipment. For some weeks sales of cotton goods have been very large. It is now difficult to secure prompt or nearby deliveries of goods, with some lines sold well ahead for the remainder of this year and considerable business booked for the first quarter of 1937. Prices show good but not excessive profits to the mills, with their position better than for many years. Consumption of cotton by American mills continues to gain, with world consumption of all cotton increasing. Although exports compare favourably with last season, demand now lags, with new business being consummated only in small volume. Renewed and increased interest in American cotton for export is expected, following the adjustment of currency values in gold bloc countries.

In the special Cotton Exchange edition of the *Journal of Commerce*, New York, Mr. W. L. Clayton, of Messrs. Anderson, Clayton & Co., refers to the rising trend of world consumption of

raw cotton as under: "Despite the competition of synthetic fibres and despite all the barriers which the nations of the world, in their feverish race towards economic nationalism, have madly erected across the path of international trade, the cotton spindles of the world are turning out about 5 per cent. more weight of goods than ever before in the history of cotton, even including the hectic days of 1928-29."

EXPORTS OF AMERICAN COTTON

Week ending Friday, October 9, 1936

					Since August 1 This Year	Since August 1 Last Year
Great Britain	..	..	..	..	242,032	186,227
France	..	..	..	..	183,272	105,490
Germany	..	..	..	..	144,286	137,510
Holland	..	..	..	..	16,246	12,492
Belgium	..	..	..	..	23,252	23,781
Russia	..	..	..	..	400	—
Denmark	..	..	..	..	9,783	7,508
Norway	..	..	..	..	1,997	2,160
Sweden	..	..	..	..	15,893	11,763
Portugal	..	..	..	..	8,455	12,908
Spain	..	..	..	..	—	39,091
Poland	..	..	..	..	32,577	40,541
Italy	..	..	..	..	43,113	67,984
Japan	..	..	..	..	237,778	217,374
China	..	..	..	..	1,385	5,703
British Columbia	..	..	..	..	3,800	2,399
Finland	..	..	..	..	1,069	1,267
India	..	..	..	..	1,150	—
South America	..	..	..	..	1,401	1,961
Latvia	..	..	..	..	1,076	259
Philippine Islands	50	50
Australia	600	150
Estonia	1,007	909
Canada	36,583	33,183
Yugoslavia	300	—
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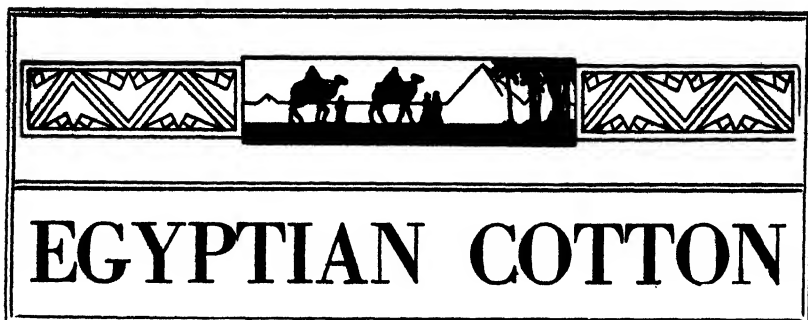
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**MINUTES of the MEETING of the JOINT
EGYPTIAN COTTON COMMITTEE, held
on Monday and Tuesday, July 27th and
28th, 1936, at 10 a.m., at the Hotel Waldhaus,
Sils-Maria, Switzerland.**

There were present: H.E. Ahmed Abdel Wahab Pasha, President of the Committee (in the chair); Mr. W. Heaps (England), Vice-President; Fouad Bey Abaza, Dr. W. Lawrence Balls, Mr. H. B. Carver, Hussein Enan Bey, Youssef Nahas Bey, Ali Bey Emine Yehia and Mr. A. Weinstein (Egypt), Messrs. W. M. Wiggins (President of the International Cotton Federation), W. H. Catterall, T. Dutton, W. A. Greenhalgh (England), Dr. Hendrik van Delden, E. Dilthey (Germany), Comm. A. Tobler (Italy), Caspar Jenny (Switzerland), F. Taylor and A. W. Palmer (U.S. Department of Agriculture), Dr. A. Spälty (Swiss Master Cotton Spinners', Doublers' and Weavers' Association), Arno S. Pearse (Expert Adviser), N. S. Pearse (General Secretary), and J. Pogson, junr. (Assistant Secretary).

At the outset of the meeting, Mr. CASPAR JENNY, in the name of the Swiss Federation, extended to the Committee a hearty welcome to Sils-Maria, and hoped that the deliberations of the Committee would come to a successful issue.

H.E. AHMED ABDEL WAHAB PASHA extended a hearty welcome to Messrs. F. Taylor and A. W. Palmer, who were attending the meeting at the invitation of the President of the International Cotton Federation. His Excellency stated that the Committee were glad for their friends from the U.S. Department of Agriculture to witness the way in which the work of the Committee was carried on. As cotton growers, Egypt and U.S.A. were partakers of the same lot. Both countries had undergone severe experiences, but he hoped that better times were in store.

Mr. PALMER suitably thanked His Excellency for his cordial welcome.

The GENERAL SECRETARY then conveyed to the meeting apologies for non-attendance from the absent members.

H.E. AHMED ABDEL WAHAB PASHA then made the following statement :—

“ Before opening our discussions, I feel it my painful duty to inform the Committee that the Egyptian Section has during the last few months suffered the heavy loss of two of its members: H.E. Emine Yehia Pasha, Vice-President of the Section, and Mr. Constantin Choremi, one of its members. Emine Yehia Pasha has held the Vice-Presidency of the Egyptian Section since its formation in December, 1927, and was Vice-President of the Joint Committee on various occasions. His sudden loss was severely felt in Egypt, his own country, for which he had done a great deal of good work, and by the Egyptian Section of which he was an active member ever since it came into existence, and I am sure you will share the sorrow we feel for his absence to-day. Mr. Choremi's death was also a great loss to the Egyptian cotton world, and we all feel very sorry that he is not among us to-day to take part in our discussions.

“ Ali Bey Amin Yehia has been nominated to replace his eminent father. Ali Bey is no stranger to cotton interests. He has been in the trade since his childhood, and at one time reached the vice-presidency of the Minet-el-Bassal Cotton Exchange. You will also find in him many of the social qualities that made his late father so popular. Mr. Choremi has been replaced by Mr. Herbert Carver, of the well-known firm of cotton exporters, Messrs. Carver Bros. Mr. Carver has been in the trade for a very long time and is personally known to most if not to all of you. For a number of years he has been President of the Minet-el-Bassal Cotton Exchange (previously the Alexandria General Produce Association) and of the Alexandria Cotton Exporters' Association. He is an authority on Egyptian cotton, having gone through various stages of its marketing for such a long period. I am sure you will find in the two new members that loyalty and that help which will make the work of the Committee still more valuable.

“ Proceeding to the subjects that have been placed upon the agenda for discussion, I have no intention of expressing any premature opinions with the idea of influencing the discussions in any way, but nevertheless there are one or two points the elucidation of which is, in my view as President of the Egyptian Section, most necessary, not only for the success of the work of the Committee, but, I dare say, for its very existence.

‘ The first point is of a general nature: namely, the weight that is given by the various spinners to the resolutions of the Committee. We meet once every year; we discuss questions of common interest to both parties, and we pass decisions of great importance to the Egyptian cotton world. We expect these decisions to be respected, not only by the people present, but by all those whom the Committee represent. As far as we are concerned in Egypt no effort has been spared to give the necessary effect to those decisions. Producers as well as exporters have abided by them. The Government have gone so far as to enforce by means of legislation, in certain cases, to give effect to decisions passed by this Committee. The Mixing Law is one instance. We therefore expect the same

force and the same consideration to be given to those resolutions by all the members of the International Federation.

"It seems, however, that this is not the case. The following is an extract from a letter I received three weeks ago from the Alexandria Cotton Exporters' Association:—

" 'Il a été porté à la connaissance de notre Comité que certains filateurs, spécialement en France, chercheraient à obtenir des exportateurs des conditions différentes de celles établies par l'accord. Les exportateurs toutefois, se considérant tous liés par cet accord, ont refusé d'accéder à ces demandes. J'ai été chargé par l'Assemblée Générale Extraordinaire de vous prier de bien vouloir intervenir auprès des filateurs faisant partie du J.E.C.C. à ce qu'ils insistent auprès des membres de leurs groupements à ce que l'accord de l'Humidité soit respecté par tous.'

"I have also received information through one of the members of this Committee regarding attempts on the part of certain spinners to induce exporters to counteract the law prohibiting the mixing of varieties on the grounds of their business needs.

"I am sure you will agree with me that the least I can say is that this is not fair play and that if we want the work of this Committee to continue successfully we must insist upon the resolutions passed and the agreements concluded being properly respected.

"The next point I should like to raise is the one relative to the Alexandria Testing House. This institution, as you are aware, has been established at the instance of the Committee and as a result of the study of the Humidity question. It was to meet the demand on the part of the spinners that it was founded and the spinners are represented on its board. Nevertheless, now that it is there they do not make as much use of it as they should. In spite of its being most efficiently run under the auspices of a board on which they are adequately represented, the spinners make comparatively little use of it. The progress report for 1935 shows that less than 10 per cent. of the tests performed by the Alexandria Testing House are tests on steam-pressed bales for spinners.

"The establishment of the Alexandria Testing House is an outcome of this Committee's decision regarding the Humidity question. It was to be made use of by the spinners for tests on bales to be shipped to them. If during 1935 only 1,100 bales for export have been tested, that is another example which shows that the spinners, I am sorry to say, do not attach the same weight to the resolutions of this respectable body as we do in Egypt, and that is a state of affairs which requires some serious investigation.

"These are the main points to which I have thought it my duty to call your special attention."

The minutes of the previous meeting having been previously circulated, were taken as read and approved unanimously.

SUBMISSION OF MOISTURE TESTS TAKEN SINCE MAY, 1935.

The GENERAL SECRETARY, in presenting a short report upon the moisture tests taken since the last meeting, stated that the weighted average percentage of moisture in Egyptian cotton had

risen to 9.47 per cent. from 9.23 per cent. and 8.80 per cent. in 1935 and 1934 respectively.

The CHAIRMAN asked what was the regulation method of testing for moisture in cotton. His desire was to see one uniform method for testing adopted by all.

The GENERAL SECRETARY stated that it was the custom for the Testing House official to go to the place where the cotton was lying and take samples from one bale in every ten.

The CHAIRMAN then observed that as far as he could see, it was not the practice for the spinners to test every bale of cotton received, but to pick out those likely to show a high moisture percentage. In his opinion, that was the reason for the high average moisture percentage of 9.47. It appeared to him that some control was needed in order to ensure the testing of every lot, irrespective of whether the lot was wet or dry.

Mr. DUTTON stated that every delivery of cotton coming to his firm's mill was tested. Several tests were taken from, say, 33 bales. Reports of his own test were always sent to the seller. If the latter desired a check upon these figures, he (the seller) sent down to the mill a Chamber of Commerce Testing House official and occasionally the shipper's representative. Copies of the Chamber of Commerce test were sent to both buyer and seller. Mr. Dutton proposed to produce figures of tests he had made at a later stage during the meeting.

Dr. VAN DELDEN believed that the high average moisture percentage was caused by the fact that only wet bales were tested. He thought that this figure was not intended to represent the average moisture content of every lot shipped from Alexandria.

Mr. CATTERALL pointed out that a spinner could scarcely tell whether a bale was damp unless he tested it. They did not pick and choose. In his opinion, the figures submitted presented a true picture of the general average moisture in the Egyptian cotton that was shipped to the spinner. Every spinner could tell that his cotton had been excessively damp when stocktaking time came round, from the extent of his invisible loss. He also stated that invisible loss had been very high during the last year.

H.E. AHMED ABDEL WAHAB PASHA stated that he had been informed that private tests had been made by spinners, and it was only when these private tests were wet that the official Testing House was called in.

Mr. WIGGINS pointed out that even allowing for His Excellency's point, the fact that the figure had gone steadily worse since 1929 was surely indicative that more moisture had been added since then. Nothing could prevent the figures revealing that fact, as they were on a comparative basis.

The GENERAL SECRETARY also stressed the fact that the figures revealed that certain shippers have always shipped dry cotton, and that others were year after year shipping above the 8.9 per cent line.

Mr. DUTTON then submitted some very interesting figures and correspondence which he had exchanged with merchants on this

question. In one case the letter read that cotton, about which he had complained, was intended for another spinner, whilst a second communication stated that the shipper regretted having shipped excess moisture but the cotton was only transferred to his (Mr. Dutton's firm's) account after shipment. The firm's cotton, he was informed, was usually shipped specially. The speaker stressed the difference in the percentage of moisture content in the same cotton bought on the spot and bought c.i.f. Some cotton, when it came in a c.i.f. shipment showed only 8.4 per cent. of moisture against 8.55 per cent. when bought on the spot. Another type, which when bought c.i.f., showed 8.76 per cent. of moisture, showed 9.87 per cent. when bought on the spot. Yet another type, which contained 8.9 per cent. when bought c.i.f., showed 9.26 per cent. of moisture when bought on the spot.

The CHAIRMAN stated that what Mr. Dutton had said went to support the arguments often used that the remedy lies in the hands of the spinner. If he is not satisfied with his cotton he can always change his shipper.

The GENERAL SECRETARY, in reply to a query, stated that the figures published referred largely to c.i.f. cotton.

Mr. JENNY stated that, in Switzerland, they only bought from shippers upon whom they could rely. Private tests were made and when the moisture was higher than 8.9 per cent., official tests were conducted. This usually put an end to the trouble. He gave it as his opinion that shippers knew which spinners were making tests. All their cotton was bought c.i.f.

Mr. GREENHALGH asked if it was always going to fall to the spinner to act as policeman to Alexandria. Why should not the agreed-upon limit be observed? Why should excess moisture occur so frequently? He stated that his own firm had conducted tests and out of 144 bales of Giza 7, there were 609 lbs. of excess moisture, *after* allowing for tolerance. Another test on 1,173 bales of Sakel revealed 3,990 lbs. of excess moisture, whilst a third test on 733 bales of Uppers showed that there was 2,699 lbs. of excess moisture. The speaker stressed the point which Mr. Catterall had made earlier in the proceedings with regard to the spinners' increasing invisible loss. He stated that where the trouble had not been due to moisture it had been due to sand. With regard to the Alexandria Testing House, he stated that it should be used by the shipper to check his own shipments to spinners in order that he may keep the moisture content of his shipment down to the required standard of 8.5 per cent.

The CHAIRMAN still submitted that the figures published in respect of moisture could not be taken as conclusive. Why should not Alexandria keep within the prescribed limits? Very often they were unaware that they were exceeding the limits. Natural moisture had to be taken into account, as also had the facts of the place of storage, the method of handling, etc. It was impossible for the exporter to guarantee a certain percentage of moisture owing to factors over which he had no control.

Mr. GREENHALGH gave further examples of complaints made by spinners in respect of the presence in bales of Egyptian

cotton of huge slabs of caked cotton. He had been informed that this had, in one instance, been brought about by some cotton getting into a hole in the floor of the conditioning room, and becoming saturated with water, resulting in this slab of cotton finding its way into a bale. It was a case of obvious neglect on the part of the man in charge of the conditioning room.

Mr. CARVER stated that he was at a loss to understand how Mr. Greenhalgh's information could possibly be correct. There was nowhere in the "farfara" where the water could collect in such a manner as that suggested by Mr. Greenhalgh. He admitted that a small percentage of caked cotton, due to overwatering, did occasionally make its appearance, but this only occurred very seldom and even then in one odd shipment. Such a condition could not be applied to the crop as a whole.

The speaker agreed with the Chairman that the moisture figures as presented to the meeting did not represent the average shipment. They had been informed by Liverpool that tests were made privately by spinners, and official tests were taken only if the cotton was wet. The speaker concluded by stating that he could not see how the spinner was any worse off than was formerly the case, as all claims were duly paid by the exporters.

Mr. DUTTON stated that it did not signify that the spinners were satisfied because the shippers had paid them the amount they owed them on account of having shipped them wet cotton. The spinners wanted correct cotton shipped to them. In the mills he represented alone it cost them £5 per week to act as detective to Alexandria. He pointed out that the Federation figures did not include the results of the Alexandria Testing House, whose figures showed a high percentage of moisture content. Why should 71 per cent. of the cotton tested even by Alexandria be over 8.9 per cent.?

Dr. BALLS said that the statement of the Alexandria Testing House could not be taken as representing the condition of the crop as a whole. Exporters did not send dry cotton to be tested. He asked Mr. Dutton whether he refunded his shipper money for cotton, the moisture content of which was below standard.

Mr. DUTTON replied that he always informed his shippers whether the cotton was correct or not. All his cotton was tested. He had even had to extend his warehouse to provide adequate facilities for this being done. He agreed that the Egyptian Government and cotton growers were far ahead of any other country in the care they took to ensure that good cotton was produced, but even then there was room for further improvement.

FOUAD ABAZA BEY stated that in his opinion the moisture figures were undoubtedly misleading. Only the wet cotton was tested and the figures published. A representative part of every shipment should be tested. He maintained that only an infinitesimal percentage of the crop contained caked cotton or sand. With regard to Mr. Dutton's remarks about cotton tested in Alexandria, the speaker drew attention to the fact that this was up-country cotton only.

Mr. WIGGINS said that no matter how the tests were made

or the figures compiled, the moisture content had nevertheless been increasing steadily year by year.

FOUAD ABAZA BEY stated that this only showed that more tests were being taken of damp cotton.

The CHAIRMAN then proposed that in order to establish a uniform method of taking tests, representatives of official testing houses all over the world be invited to the International Cotton Congress to be held in Egypt in 1937.

Mr. DUTTON maintained that a representative of the Liverpool Cotton Association should be appointed to the Joint Egyptian Cotton Committee.

Mr. WIGGINS stated that an invitation had been sent to the Liverpool Cotton Association to attend this meeting, but they were unable to see their way to accept it.

REPORT ON WEIGHT CHANGES OBSERVED FOR EXPORT AND COUNTRY BALES WITH AN AUTOMATIC BALANCE.

Dr. BALLS briefly explained the paper with regard to this subject which he had submitted to the meeting. It was impossible to determine definitely the weight of a cotton bale, unless it stood in a permanently fixed place with stable atmospheric conditions.

Mr. DUTTON then submitted details of tests which he had taken at Dr. Balls's suggestion. He stated that he had taken records of the changes in weight, over a period of some months, of bales stored in:

- (a) A normal bale store.
- (b) A store specially built to retain moisture in yarn and waste in all weathers.
- (c) The conditioning cellar constructed to add moisture to yarn brought in from warm dry spinning rooms.

A bale of Uppers and one of Giza 7 never varied more than half a pound in four months in either (a) the normal bale store or (b) the yarn and waste store. In the conditioning cellar the bale of Uppers gained $2\frac{1}{2}$ lbs., and that of Giza 7 gained 2 lbs. Another bale lost $1\frac{1}{2}$ lbs. in the first six weeks, following which it showed no variation for two months. Another bale gained half a pound, whilst a bale of cotton gained 5 lbs. in the conditioning cellar. He did not think that, taken over all, there was a great deal of variation in weight in pressed bales of Egyptian cotton. He gave it as his opinion that the spinner could obtain the correct cotton from the right shipper. He had already refused to have any further dealings with three shippers, and hoped that other spinners would do the same as he had done in this respect.

Mr. HEAPS thanked Dr. Balls for his paper, which he stated was very helpful and instructive. He found occasionally that bales varied in weight in the course of transit from one place to another. It often happened that bales weighed at the Manchester Docks were found to weigh less when delivered at the mills, which were some ten miles away.

Mr. DUTTON stated that the English spinner preferred to

have his cotton tested in England. Why should they use the Alexandria Testing House? He gave an example, however, of one of his shippers who had paid him a claim for excess moisture on results obtained by the Alexandria Testing House, although a test made by the Manchester Chamber of Commerce Testing House on the same cotton after arrival in England showed an appreciably lower moisture content. He had pointed this out to the shipper, but the latter insisted on paying on the Alexandria results.

The CHAIRMAN, in reply to Mr. Dutton, stated that the spinners should use the Alexandria Testing House, because it was established at the request of the spinners.

Dr. BALLS stated that it was also much cheaper than the other testing-houses.

Mr. CATTERALL maintained that the spinners had always reserved to themselves the right of having their cotton tested where they pleased, and that they would insist upon doing so.

Dr. BALLS stated that any spinner could buy cotton which would be invoiced out of Alexandria, not at its actual weight, but at the weight it would show if it contained the normal percentage of moisture.

PROGRESS REPORT OF THE ALEXANDRIA TESTING HOUSE.

Dr. BALLS, in introducing the paper which he had prepared in connection with this question, stated that the Alexandria Testing House had been enlarged, and that it was now practicable to enlarge it still further. The Testing House was a solvent institution and was likely to remain so.

The CHAIRMAN asked why spinners did not make greater use of the Alexandria Testing House.

Mr. DUTTON asked if anyone could give him a reason as to why he should use the Alexandria Testing House in preference to the one in Manchester.

Dr. BALLS stated that in Alexandria they could test at the presshead and therefore effect a saving in the cost of the tests. Comparative figures showed practically no difference between tests taken when the bales were opened and tests taken at the presshead.

Mr. DUTTON held that his figures had never been disputed. The shipper should test the cotton in Alexandria before shipment, and the spinner when the cotton arrived at its destination.

Dr. BALLS commented on the figures given by Mr. Dutton as showing that Alexandria allowed 1 lb of cotton for every bale more than did Manchester.

MOISTURE AGREEMENT.

The GENERAL SECRETARY read the draft resolution agreed upon by the spinner members of the Joint Egyptian Cotton Committee at their meeting earlier that day and quoted below:—

“It is hereby agreed that the degree of humidity which Egyptian cotton shall contain is 8.50 per cent., with a tolerance of 0.4 per cent. up or down as the case may be. No claim shall

be made by the spinner if the moisture content of the cotton is below 8.90 per cent., and no claim may be made by the shipper if the moisture content of the cotton is above 8.10 per cent. Should any shipment contain more than 8.90 per cent. of moisture, the spinners' claim in respect of such shipment shall be retrospective back to 8.50 per cent. Conversely, should any shipment contain less than 8.10 per cent. of moisture, the shippers' claim in respect of such shipment shall be allowed up to 8.50 per cent. There is no allowance to be made by either party if the moisture content of the shipment is between 8.10 per cent. and 8.90 per cent.

"The cost of the moisture tests shall be borne by:—

- (a). The buyer, in a case where the result shows a percentage of humidity below 8.50 per cent.
- (b) The seller, in a case where the result shows a percentage of humidity in excess of 8.50 per cent.

"The samples to be tested are to be drawn by a representative of an officially recognised testing house and the tests are to be conducted in an official testing house, and a certificate of the result is to be issued to both buyer and seller. Representatives of both parties shall have the right to be present when samples are drawn, but notice of three full working days after the arrival of the cotton at the place of testing is to be given by the party calling for the test in conjunction with the testing house, to the buyer or seller as the case may be. The parties will be free to arrange whether the samples drawn for testing shall be taken in Alexandria, the port of disembarkation, or the mill. Weights are to be taken under official supervision at the time of drawing the samples."

The CHAIRMAN stated that the Alexandria Cotton Exporters' Association had asked him to declare that they were not prepared to accept any modifications whatsoever regarding the tolerance or the cost of tests.

Mr. CATTERALL emphasized that what the spinners wanted was that the standard agreed upon, i.e., 8.5 per cent., should be better observed by the shippers. The spinners had only agreed to the tolerance under pressure. Surely it was in the true spirit of the agreement that, if a shipment exceeded 8.9 per cent. of moisture, then the shipper should pay back to 8.5 per cent. He maintained that since the inception of the agreement, the spinners had complained that the moisture content in Egyptian cotton had increased.

The representatives of the Alexandria Cotton Exporters' Association (Mr. CARVER and ALI BEY EMINE YEHIÄ) stated that it had been unanimously decided by an extraordinary general meeting of the members of the Alexandria Cotton Exporters' Association, held some time previously, to renew the moisture agreement, as it stood at present, for a further period of two years. No modification in the existing conditions could be countenanced, however. The tolerance must be the same as had hitherto been in operation, and as had been agreed upon at the various Congresses in Paris (1931), Prague (1933), and Rome

(1935). The question of the payment for tests must also remain the same as hitherto. The speakers also wished to stress the fact that certain spinners had approached certain shippers with a view to persuading the latter to "contract-out" of the agreement, thereby militating against the spirit of the agreement. Shippers had even been asked to ship damp cotton. They desired that a register of official Testing House returns should be sent to them in Alexandria. Whatever resolution was passed at that meeting would have to be referred by them to the Alexandria Cotton Exporters' Association for ratification.

Mr. CATTERALL asked what was his position as a spinner, when he had to pay claims in respect of moisture in cotton yarn when this exceeded 8.5 per cent. There was no tolerance given to him, and it was certainly not equitable that the spinner should have to allow the shipper a tolerance of 0.4 per cent. which was a total loss to the spinner in almost every shipment.

Mr. TOBLER asked for the names of the spinners who had tried to "contract-out" of the agreement.

The CHAIRMAN suggested that the names of such spinners should be published in the INTERNATIONAL COTTON BULLETIN.

Mr. WIGGINS stated that this could scarcely be done, but that the spinners' own local Associations should be notified.

Mr. CARVER stated that they had repeatedly asked the importers for the names of the offending spinners, but the importers would never expose them for obvious reasons.

Mr. DUTTON stated that he had been told that he would have to pay more for his cotton if he insisted upon the insertion of the humidity clause in the contract. He thought that spinners would be foolish to think that they could obtain cheaper cotton by agreeing to the addition of *more* moisture.

Mr. H. B. CARVER supported by ALI BEY EMINE YEHAIA stated that they understood that every bale of cotton shipped from Egypt was governed by the Moisture Agreement, whether it went to the spinner directly or to brokers. They had heard that some spinners did not regard themselves as bound by the agreement, although Alexandria exporters considered themselves bound to observe strictly the agreement. They wished to know whether or not every spinner was also bound by the agreement, or whether it was a one-sided agreement.

Mr. WIGGINS and Dr. VAN DELDEN replied that such was the case. Spinners were bound by the agreement.

Mr. CARVER stated that certain exporters' representatives had been informed that control could not be exercised over *all* spinners. Ali Bey Emine Yehia confirmed Mr. Carver's statement.

Mr. DUTTON said that not all spinners were members of national associations.

Mr. HEAPS stated that the Committee had created a custom, and had therefore, committed the trade. They had already had to protest against one country breaking the agreement.

The representatives of the ALEXANDRIA COTTON

EXPORTERS' ASSOCIATION stated that they had tried to settle matters between Alexandria and Liverpool. It seemed to them that it would be only fair to apply this agreement to all cotton, no matter whether it was shipped directly to a spinner or through brokers. The Liverpool Cotton Association's opinion was that this would lead to trouble between the spinners and themselves (the Liverpool Cotton Association).

Would the spinners themselves care to approach the Liverpool Cotton Association in the matter, so that exporters, spinners and brokers would all respect the humidity resolutions.

Mr. GREENHALGH stated that Liverpool found it difficult to insert a moisture clause into the c.i.f. contract. The Liverpool Cotton Association and not the Spinners' Federation drew up these contracts.

Mr. HEAPS maintained that any agreement which the spinners might make with the exporters could not function properly unless the terms of such agreement were included in all contracts. Some spinners had protested against certain clauses in the agreement, but had the exporters done all they could to see that the spirit of the agreement had been kept? The late Mr. William Howarth had said that all the spinners wanted was fair play. It had always been his opinion that the Moisture Agreement had been a definite step forward. He was sanguine enough to believe that, when an understanding had been reached, a better spirit would prevail.

Mr. DUTTON stated that the whole point of the discussion had turned on Liverpool.

The GENERAL SECRETARY read a letter from a member of the English Federation, calling attention to the need for modification in the matter of the tolerance. The letter ran as follows:—

"We are being very much troubled with excess moisture in our deliveries of Egyptian cotton. We have had cotton with as high a percentage as 11.5 and we are frequently getting tests of 10 per cent.

We have not much difficulty in getting our claims recognized, but there is a good deal of inconvenience caused through having to wait until a representative from the Testing House has arrived to take samples. In some cases, the cotton is 'caked,' and we have just had a train of wheels broken in our scutcher through some 'caked' cotton having got through.

Although our claims are being paid, we lose 0.4 per cent. allowed for tolerance, and this is equal to £350 per annum, on our consumption, and for which we get nothing.

Our view is that the agreement regarding the tolerance allowance is wrongly applied, and is the root cause of a lot of trouble. It should have been arranged, that where the moisture exceeded 8.9 per cent., the basis of the claim should have reverted to 8.5 per cent. 's it is, the shippers appear to want to be *certain* that they are getting the full 8.9 per cent., although they are agreeable to allow any claims they may get above that figure.

We have refused to buy any more cotton from two mer-

chants, whose shipments were consistently overdamped. It is the only way of defending ourselves, although we are sorry to have to take such steps.

We are now troubled with the shipments of another merchant, and have just had to claim on five shipments, nearly 10s. a bale. We feel that strong steps should be taken to stop this dishonest practice, and we shall be glad if you can do anything to help.

In our opinion, one of the most effective measures would be to cancel the tolerance. The trouble has been much worse since this arrangement has been in force, and seeing that spinners are bound to 8½ per cent. moisture, in their yarns, it is surely ridiculous to allow cotton suppliers to put 8.9 per cent. moisture in raw cotton.

Our working results last year, showed a higher invisible loss than we have ever had before, and there is nothing to account for it, except overdamped cotton.

We hope, therefore, that this evil may be dealt with in a very thorough and drastic manner by your Committee."

Dr. VAN DELDEN stated that German spinners had to pay on any moisture in excess of 8.5 per cent. contained in the yarn they sold. They had therefore to exercise special care in making sure that as far as possible, their cotton conformed to the requisite 8.5 per cent. moisture standard. With regard to the agreement itself, he stated that, in the course of time and from actual experience, the spinners had found the proposed modifications in the agreement to be necessary. The spinners were tired of losing the 0.4 per cent. If the spinners obtained these new terms, they would be better able to induce their fellow spinners in the various countries to keep the agreement.

The CHAIRMAN then summarized the proceedings. He concluded by moving the following resolution which was carried unanimously:—

HUMIDITY AGREEMENT.

"In consideration of the following resolution of the Spinner Sub-Committee of the Joint Egyptian Cotton Committee:—

"It is hereby agreed that the degree of humidity which Egyptian cotton shall contain is 8.50 per cent., with a tolerance of 0.4 per cent. up or down as the case may be. No claim shall be made by the spinner if the moisture content of the cotton is below 8.90 per cent., and no claim may be made by the shipper if the moisture content of the cotton is above 8.10 per cent. Should any shipment contain more than 8.90 per cent. of moisture, the spinners' claim in respect of such shipment shall be retrospective back to 8.50 per cent. Conversely, should any shipment contain less than 8.10 per cent. of moisture, the shippers' claim in respect of such shipment shall be allowed up to 8.50 per cent. There is no allowance to be made by either party if the moisture content of the shipment is between 8.10 per cent. and 8.90 per cent.

The cost of the moisture tests shall be borne by:—

- (a). The buyer, in a case where the result shows a percentage of humidity below 8.50 per cent.
- (b) The seller, in a case where the result shows a percentage of humidity in excess of 8.50 per cent.

“ The samples to be tested are to be drawn by a representative of an officially recognized testing house and the tests are to be conducted in an official testing house, and a certificate of the result is to be issued to both buyer and seller. Representatives of both parties shall have the right to be present when samples are drawn, but notice of three full working days after the arrival of the cotton at the place of testing is to be given by the party calling for the test in conjunction with the testing house, to the buyer or seller as the case may be. The parties will be free to arrange whether the samples drawn for testing shall be taken at Alexandria, the port of disembarkation, or the mill. Weights are to be taken under official supervision at the time of drawing the samples.”

“ And in consideration of the following resolution of the “ Alexandria Exporters’ Association:—

“ That no change in the existing agreement is admissible under present circumstances, and that the Association is prepared to renew the agreement for a period of two years.”

“ This meeting of the Joint Egyptian Cotton Committee “ resolves that the present agreement shall remain in force until “ fourteen days after the termination of the International Cotton “ Congress to be held in Egypt in December, 1937, when it is “ hoped that an agreement will be mutually decided upon.”

PROGRESS REPORT OF THE SPINNING TEST STATION AT GIZA.

Dr. BALLS, in introducing his paper, stated that the Spinning Test Station at Giza, as a mill, was only a very small organization. As an accessory to commercial work, however, it had far exceeded his greatest expectations. He stated that an important fact proved by their spinning tests was that the relative price of all long-staple cotton is proportionate to its yarn strength. He stated that it was possible that even stronger cottons might be shown at the Congress in Egypt next year

EGYPTIAN COTTON CONTRACT BASES.

Mr. HEAPS raised the fact that there were two different standards for Egyptian cotton. It scarcely seemed right to him that the Liverpool standard should differ from the one in Alexandria.

The CHAIRMAN wished to know if anything had been done regarding the question in Liverpool.

Mr. GREENHALGH stated that there had been much discussion, but that nothing had actually been settled. Three contracts might be affected, viz., Liverpool, Alexandria, and the c.i.f. contract.

In answer to a query from the Chairman as to where exactly the difference between Liverpool and Alexandria lay, Mr. WIGGINS stated that Liverpool sold c.i.f. contracts 18 months ahead, whereas Alexandria would only sell 12 months ahead. One could not, therefore, make commitments for 18 months ahead, when the box might vary in 12 months' time.

Mr. CARVER stated that standards in Alexandria were always considered to be the same every year. New standards were made each year, but these were supposed to be equal in all respects to those of the previous year.

Mr. WIGGINS reminded the meeting that America had established standards to last for three years.

Mr. FRED TAYLOR stated that when the United States Department of Agriculture established standards for grade, standards had to be agreed upon, which were representative of the characteristics of the Cotton Belt as a whole, and not of one or two particular states, and in order to obtain such a composite standard samples had to be obtained from every county in the Cotton Belt. The box had to be a composite quality, representative of the whole of the Cotton Belt.

HIS EXCELLENCY asked whether there was anything to prevent the Alexandria standards being used in Liverpool.

Mr. CATTERALL considered that it would be better if the standards were the same in Alexandria and Liverpool.

Mr. CARVER asked whether it was a question of raising the tender basis from Fully-Good-Fair to Good.

Mr. CATTERALL said that he wanted the same conditions to apply in both markets.

Mr. CARVER stated that Liverpool was going to attempt to introduce a Giza 7 contract, and abolish the Sakel contract. Sakel, Giza or Soudan Sakel would be tenderable against the contract, but not Maarad. This, however, had not yet been passed by the General Committee of the Liverpool Cotton Association.

Mr. CATTERALL held the view that if new contracts were to be introduced, it would be better for them to be introduced in both markets, Liverpool and Alexandria.

Mr. WIGGINS asked Mr. Carver if Alexandria could extend their existing contract to two years.

Mr. CARVER stated that, during the course of the many arbitrations which take place in Alexandria in a year's time the samples in the boxes lost their bloom and became battered about. That was the reason why new ones were required each year.

Mr. HEAPS asked if these were for grade only, to which ALI BEY EMINE YEHIA replied that the standards in Alexandria refer to the various grades with average staple.

Dr. BALLS stated that the boxes were made up each year, owing to loss of bloom in storage.

Dr. YOUSSEF NAHAS BEY said that they were ready to sell their boxes to anyone requiring the same.

Mr. DUTTON stated that the danger for the moment was that the spinner had no hedge against his cotton. He cited the recent wide fluctuations in the market and maintained that the Liverpool market was in the hands of speculators.

Mr. CATTERALL appealed for a uniform contract. He stated that if a contract basis was fixed in Alexandria which was not applied in Liverpool and he wanted cotton from Alexandria, he might be penalized if he hedged in Liverpool.

Mr. WIGGINS thought that the International Cotton Federation and the Joint Egyptian Cotton Committee should work together in order to achieve this aim.

Mr. CARVER emphasized that Liverpool had only been considering changing the name of the contract. The basis would still be Fully-Good-Fair. The basis remained the same in Liverpool as in Alexandria. Liverpool did not consult them in this matter.

ALI BEY EMINE YEHIA explained that a most important point to be considered and cured is the fact that we must have both in Alexandria and Liverpool not only the same denominations used, such as Fully-Good-Fair or Fully-Good-Fair to Good, as at present, but the various denominations in Alexandria and Liverpool should apply to exactly the same grades in actual classification. Presently a Fully-Good-Fair in Liverpool does not correspond at all to the Fully-Good-Fair grade in Alexandria, and we see differences in the same denominations reaching a full half grade.

Mr. DUTTON wondered if the Committee was not pretending to a little more ignorance of the state of affairs than was actually the case. Giza 7 was tenderable with penalties but the penalties were not acceptable. This was another reason why the presence of a representative of the Liverpool Cotton Association at these meetings was desirable.

Mr. CATTERALL stressed the need for arriving at a decision before two contracts might be forced upon spinners, one by Alexandria and the other by Liverpool.

The CHAIRMAN stated that the Committee could not make rules for Liverpool.

Mr. DUTTON stated that no new contract would be given to the spinners until it was a *fait accompli*.

The CHAIRMAN asked what exactly they wished to communicate to Liverpool. Surely the bases in Alexandria and Liverpool should be the same.

Messrs. HEAPS and DUTTON agreed.

Mr. CARVER quoted from the paper presented to the meeting upon the subject "That, for the existing Sakel and Uppers contracts, there should be substituted a 'long-staple' contract, and a medium staple one, the basic variety in each case being the lowest-priced cotton on the tenderable list in the respective categories at the time of delivery."

He stated that that was the crux of the matter. Giza would

always be the cheapest of the long-staple growths. That was what Liverpool was aiming at.

Mr. GREENHALGH stated that Liverpool realized how narrow the market was, and this was a genuine effort on its part to do something. They wished to bring in every possible bale tenderable under this contract.

Dr. YOUSSEF NAHAS BEY made the point that Giza 7 might not always yield the largest crop, as was the case at the moment. Sakel, Maarad and Sakha 4 when added together, totalled more than Giza 7.

Dr. BALLS directed attention to the fact that what they were settling to-day would doubtless need revision within seven years.

Mr. CATTERALL stated that it was, after all, a matter for technical discussion between Alexandria and Liverpool.

The following two resolutions were submitted and unanimously approved :—

Standards for Grades of Egyptian Cotton.

“ In view of the differences existing between the Alexandria and the Liverpool standards for grades of Egyptian cotton, the Joint Egyptian Cotton Committee recommends that exact duplicates of the Alexandria standards for Grade should be supplied to the Liverpool Cotton Association and to any other cotton association requesting the same in order that one uniform set of standards may be applied throughout the world.”

Uniformity of Cotton Contract Bases (Egyptian).

“ The Joint Egyptian Cotton Committee expresses the hope that no final decision regarding the Egyptian contract should be taken by Alexandria or by Liverpool before the communication between them has been established, with the object of making both contracts uniform, with their standards identical.”

PROGRESS MADE IN REGARD TO COTTON COVERING FOR COTTON BALES.

Dr. BALLS in presenting his paper observed that until last year those in Egypt who were attempting to introduce the cotton covered bale had only regarded the question from the point of view of cost of production. It had occurred to him to spin some yarn from cotton adulterated with jute, and compare the yarn strength when spinning this mixture with the yarn strength obtained when spinning straight cotton. Little or no difference was noticeable between the two results obtained. The speaker went on to state that it might be that the facilities at Giza for spinning this mixture of cotton and jute were naturally better than those which the industry as a whole could provide. All the facts resulting from their experiments had proved to them that the damage caused by jute fibres was less than the spinners claimed. He appealed to spinners to conduct spinning tests with jute contaminated cotton in their own mills, in order to justify their claims.

Mr. CATTERALI pointed out, that, in the mill, the trouble occurred mostly in the mule spinning. The spinning plant at Giza was composed of ring spindles.

Dr. BALLS said that this was all the more reason why spinners should make their own tests.

Mr. GREENHALGH stated that his experience was that breakages on the spindle point were due to the presence of a small fibre; whether it was jute or not he could not say. The trouble occurred at certain periods of the year. They would have no trouble at all for months together, and then suddenly they would find the damage occurring all at once. The speaker suggested that this fibre grew in fields adjacent to cotton plantations, and that it was blown on to the cotton boll at certain periods of the year. He exhibited a box full of broken ends caused by this fibre. He stated that the yarn was mule yarn.

FOUAD ABAZA BEY suggested that the fibre might be "til."

Mr. DUTTON asked Dr. Balls whether it would be possible for him to repeat his experiment on mule spindles.

Dr. BALLS replied in the negative.

Mr. DUTTON stated that he had not heard of the trouble occurring in ring spinning, but in view of the fact that the great bulk of the Egyptian crop went to supply the needs of mule spindles, he thought that the Egyptians might conduct similar experiments on mule spindles.

Mr. GREENHALGH maintained that their ends were broken by these fibres. They had established proof of that. Wherever the fibres came from, and whatever they were, they were present in the cotton, and spoiled the yarn.

Dr. BALLS proposed that the matter should remain in abeyance pending the results of the spinners' experiments.

Dr. VAN DELDEN was of the opinion that the trouble was caused not so much by jute fibres as by cotton coming into contact with jute during the handling processes.

Dr. BALLS said that this was included in the scope of the experiments.

The CHAIRMAN reminded the meeting that spinners would not pay the increased cost of cotton bagging.

Mr. HEAPS stated that in the opinion of his firm, if cotton bagging was going to cost anything extra it was not worth while.

Mr. CATTERALI asked if the trouble occurred with American cotton.

Dr. VAN DELDEN replied that it did.

PRELIMINARY ARRANGEMENTS FOR THE INTERNATIONAL COTTON CONGRESS TO BE HELD IN EGYPT IN 1937.

On the motion of HIS EXCELLENCY AHMED ABDEL WAHAB PASHA it was decided that the above Congress should be held in Egypt from December 7th to December 12th, 1937, and

that Fouad Abaza Bey, Hussein Bey Enan, Dr. W. L. Balls and Mr. Arno S. Pearse should form a small sub-committee, with the object of making all necessary arrangements for the Congress. It was also suggested that the special committee should make every endeavour to obtain cheaper hotel and travelling expenses and inform the General Secretary at an early date.

EVOLUTION OF EGYPTIAN COTTON MARKETS BY VARIETY AND COUNTRIES.

An interesting paper upon this subject was submitted to the meeting by ALI BEY E M I N E Y E H I A. He stated that the paper was an attempt to explain why these evolutions and changes had taken place.

GROUPING OF EGYPTIAN COTTON BY STAPLE LENGTHS FOR STATISTICAL PURPOSES.

The meeting discussed a paper which had been prepared by the Egyptian Section of the Committee.

Mr. H E A P S stated that he supported the suggestion made by Mr. C. H. Brown, of the Cotton Research Board, Giza, that it might be more satisfactory to change the basis of classification leaving only $1\frac{1}{2}$ ins. cottons, i.e., Sakel, Sakha 4, Maarad and Giza 26 as long staple and bring Giza 7 down into the medium-long staple group in which Giza 12 will also be included.

Mr. W I G G I N S wished to know how this would affect the proposed new Giza 7 contract.

Mr. T A Y L O R asked if grouping was done by varieties.

The C H A I R M A N stated that grouping was done by staple length only. The cotton year in Egypt began in September and ended in August. He felt that there should be uniformity upon this question between Egypt and the other cotton growing countries, and that, with this object in view, the season in Egypt should start in August and end in July. This would be of great assistance for statistical purposes. He proposed that this suggestion should be forwarded to the Alexandria Cotton Exporters' Association.

Mr. P A L M E R, speaking in a personal capacity only and not as representative of his Government, stated that there had been some thought in U.S.A. of the possibility of changing the dates of the cotton year. Some years ago, the opening date had been brought forward from September 1st to August 1st, but now some of the new crop was making its appearance prior to August 1st. He did not know what might come of it but if the Egyptian Government were contemplating making a change it might be worth their while to bear this in mind. He agreed with the Chairman that a uniform cotton season everywhere would be a great help to all concerned.

Dr. V A N D E L D E N and Mr. C A R V E R suggested collaboration between Egypt and the U.S.A. on this question.

Mr. P A L M E R promised to report this to his Department in due course.

THE DÉPORT IN THE COTTON MARKET.

The CHAIRMAN drew attention to the existence of such a strong déport (i.e., discount upon the distant months) in the market at the moment, and asked why this should be so.

Mr. PALMER, speaking from the point of view of the American market, stated that various explanations had been offered. One was that at the moment no great abundance of spot cotton was available.

The CHAIRMAN asked what was the position with regard to cotton held by the United States Government.

Mr. PALMER said that the Government had undertaken to release stocks in which it had an interest, and that these stocks had been greatly reduced. He did not have late figures, but he thought that the stocks might well be under 3,500,000 bales. He said that cotton could only be drawn from Government stocks until July 20. The Government could not well release further quantities at this time, because the new crop was beginning to move and the Government did not desire to come into the market in competition with the growers.

The CHAIRMAN pointed out, however, that the déport had been going on for over a year.

Mr. TAYLOR stated that they found that it cost 8 to 10 points a month to carry cotton in the United States. On account of the scarcity of obtaining suitable spot cotton, the near months were at a premium.

The CHAIRMAN stated that there was plenty of cotton in the world.

Mr. TAYLOR gave an instance of a firm in the Far East which could only obtain 500 bales of a certain type of which they wanted 5,000. This meant that the premium on the near months was forced higher. Industrial conditions in U.S.A. were also to some extent responsible for the uncertainty of the price movement. The forward months in consequence were neglected and the near months constantly under pressure. No spinner would buy for forward delivery; consequently the high pressure on spot or near months naturally inflated the premiums on near months. The forward months were in no demand and narrow differences naturally resulted.

At this stage the meeting was adjourned until the next day.

The meeting was resumed on the following day, July 28, at 10 a.m.

PROPAGANDA FOR EGYPTIAN COTTON.

Dr. YOUSSEF NAHAS BEY introduced the paper dealing with this subject, which he had prepared for the meeting.

He stated that in Egypt there was a marked tendency towards the extension of cotton propaganda, as was the case in the United States. The Filature Nationale, the Royal Agricultural Society, and the Banque Misr were all playing their parts in this propaganda work. He stated that his paper had been prepared with the object

of inviting constructive criticism from spinners and others interested in the development of Egyptian cotton.

Mr. PALMER, in answer to a request from the Chairman, gave a detailed explanation of the way in which cotton was being used in the improvement of secondary roads in the United States.

Mr. HEAPS stated that from a propaganda point of view he looked upon Nahas Bey's paper as the best put forward on behalf of Egyptian cotton up to the present.

Mr. GREENHALGH regarded the matter of propaganda for Egyptian cotton as a question for the attention of the manufacturer rather than of the spinner. In any exhibition, fabrics appealed to the eye far more than did yarns.

Dr. BALLS instanced the propaganda which had been spread abroad on behalf of West Indian Sea Island cotton.

The GENERAL SECRETARY told the meeting that the Indian Central Cotton Committee had appointed a Publicity Officer to disseminate news appertaining to any aspect of the Indian cotton crop. This official was in constant touch with the newspapers of cotton textile countries and regularly forwarded news items for publication. He suggested the Egyptian Government should undertake a similar service, as in his opinion news items of interest regarding Egyptian cotton were difficult to obtain.

HIS EXCELLENCY thought that the matter of the appointment of a Publicity Officer was one which ought to receive careful consideration by the Egyptian Government, and promised that the General Secretary should receive any information for publication in the INTERNATIONAL COTTON BULLETIN which the Government may have.

The CHAIRMAN stated that some liaison was necessary between the Egyptian section of the Committee, and if possible a manufacturer. He suggested that Dr. Youssef Nahas Bey, as representing the Egyptian Section, should co-operate with a manufacturer, to be nominated by the International Cotton Federation.

Mr. CATTERALL proposed that the General Secretary should represent the International Cotton Federation, at least for the time being. This was unanimously approved.

THE DESIRABILITY OF NAMING AND NUMBERING VARIETIES OF COTTON.

It was pointed out that there were so many numbers attached to the many varieties of Egyptian cotton that it was possible that they may lead to some confusion. The spinners were asked whether they would prefer names to numbers.

Mr. GREENHALGH thought that, at the present time, names were preferable to numbers.

All the spinners agreed with Mr. Greenhalgh.

Mr. DUTTON asked whether the names and numbers, such as Giza 7 already in existence, would be altered.

Dr. BALLS said that the existing varieties would continue to be known by their names and numbers, but any new varieties would bear names.

NEW CHEMICAL METHODS APPLIED TO COTTON.

Mr. HEAPS stated that developments in the research department of various organizations connected with the cotton trade were going on and from time to time were responsible for the appearance of new and improved lines of goods on the market. He instanced the uncreasable fabric of Messrs. Tootal, Broadhurst, Lee & Co.

PROGRESS IN THE CONSUMPTION OF ARTIFICIAL SILK.

The CHAIRMAN opened the discussion on this subject by instancing the amount of competition from artificial silk that Egyptian cotton was being called upon to face.

Dr. VAN DELDEN stated that the use of artificial cotton and artificial silk would be bound to affect the consumption of Egyptian cotton. Some countries, owing to lack of currency for the purchase of foreign exchange, had been compelled to develop their own resources. He instanced the fact that five huge plants were even now being constructed in Germany for the preparation of staple fibre. This was in addition to three already working. In his opinion some qualities of staple fibre were stronger even than the finest Sakel cotton produced. The staple fibre also had the advantage that it could be cut to specified lengths. No combing was necessary and there was no waste. It had been asserted that staple fibre lost its strength when it was brought into contact with moisture, but a new chemical process now prevented this happening. Staple fibre had already replaced cotton and wool in Germany to the extent of about 30 per cent. He maintained that this replacement would specially affect the consumption of Egyptian cotton. Nowhere was propaganda for Egyptian cotton more necessary than in Germany. They preferred to do business with Egypt on account of the existing barter agreements between the two countries, a system to which the United States would not agree. He gave it as his opinion that, owing to the manufacture of artificial fibres, millions of people engaged in the production of raw cotton would be thrown out of work, just as was the case in the indigo industry many years ago, when Germany began to produce artificial indigo, after having previously imported it from India. He was very pessimistic regarding the future of American cotton in Germany. He stressed the fact that every cotton growing country should trade with those countries which take its cotton, and warned Egypt, which is already becoming industrialized against competing with the very countries upon which she relies to buy the cotton which she has to sell.

Mr. WIGGINS doubted whether the progress made by staple fibre had affected the consumption of Egyptian cotton.

Dr. BALLS was of the opinion that the replacement of cotton by staple fibre was taking place at the expense of the inferior cotton rather than of the better varieties. However much was put into staple fibre, it was difficult to replace the molecular construction and architecture of cotton built up by living cells, with consequent strength. Similarly the development of rayon had actually increased the use of real silk.

Mr. HEAPS stated that the use of artificial fibre was having

its effect upon the sale of Egyptian cotton yarns for gloves. Cotton yarn sales in this case were appreciably down.

Mr. JENNY instanced what appeared to him to be a strange anomaly in that some countries which were paying cash to Egypt in payment for cotton could not obtain orders from Egypt for manufactured goods, as the latter had to give preference to countries with which she had compensation agreements.

MARKET REQUIREMENTS AND PROSPECTS FOR WHITE EGYPTIAN COTTONS.

The CHAIRMAN asked what were the prospects for a white Egyptian cotton.

Mr. CATTERALL stated that Tanguis Peruvian cotton, a white variety, was in large demand by the spinners.

Dr. BALIS wished to know whether there was a large demand for white cotton at the price of Egyptian. Tanguis was, of course, cheaper.

FOUAD ABAZA BEY stated that the varieties of white cotton formerly cultivated in Egypt had become extinct. Appeals had, however, been forthcoming of late from various quarters in the spinning industry for a white cotton. It was stated that those branches of the spinning industry catering for the hosiery and the knitting trades had put forward a request for a white Egyptian cotton. Savings would be affected in the bleaching, dyeing and finishing processes, it had been stated, if such a cotton could be produced. The Royal Agricultural Society had, therefore, produced a variety known as Bahtim, a cross between Sakel and Maarad. This cotton had a staple length of $1\frac{1}{8}$ ins., and its qualities were similar to those of Giza. It was the colour of Tanguis and was likely to have a high yield. Before developing the cultivation any further, however, they wished to have the spinners' opinion on the cotton, specimens of which were exhibited at the meeting.

Mr. CATTERALL thought that there was a demand for such cotton. It was for the Egyptians to enlarge the extent of its production and so bring the price down, which would naturally result in an increased demand from the spinner.

Dr. VAN DELDEN expressed his satisfaction with the cotton and felt that it would meet a long standing want in the trade.

FOUAD ABAZA BEY stated that the purity of the cotton would be rigidly controlled. The price would be less than that of Giza 7.

Mr. ARNO S. PEARSE stated that, in his opinion, the cotton would make a good substitute for Peruvian. Some spinners wanted white cotton but others a creamy cotton.

Mr. HEAPS was of the opinion that there must be a considerable difference between white Egyptian and Tanguis cottons. White Egyptian would find the market on its merits. It had never, hitherto, been popular in the trade.

Mr. DUTTON thought that the Royal Agricultural Society

should be encouraged to popularize this white variety. He himself would prefer to use white Egyptian if possible.

Mr. TAYLOR thought that this variety was better than Tanguis cotton for tyre fabrics. Tanguis cotton was much rougher.

FOUAD ABAZA BEY: I conclude, gentlemen, from the various views expressed that you think that Bahtim cotton is a promising variety, and that you would like the Royal Agricultural Society of Egypt to continue with its development for requirements of the cotton trade. The members unanimously agreed.

EGYPTIAN COTTON FREIGHT RATES FROM ALEXANDRIA.

Mr. DUTTON opened the discussion on this subject by quoting the existing freight rates on cotton shipped from Alexandria to various ports in Europe and the Far East as follows:—

Alexandria to Lancashire: 19s. (2 bales) or .15d. per lb.

Alexandria to Japan: 25s. per 1,000 kilos (3 bales) or .135d. per lb.

Alexandria to Bombay: 25s. per ton (3 bales) or .10d. per lb.

Alexandria to Antwerp: .123d. per lb.

In quoting these figures the speaker raised the question as to why it should cost more to ship cotton to Lancashire than to Japan.

Dr. BALLS suggested that, in the case of Japan, subsidized shipping might be the reason for the cheaper freights to that country.

ALI BEY EMINE YEHIA stated that he wished to reply not in his capacity of a director of one of the steamship companies engaged in the Alexandria—Liverpool—Manchester service, but as an exporter and a member of this worthy Committee, to the points raised by Mr. Dutton.

The liner service from Egypt to Great Britain had been established since cotton was first shipped. The ships on the service had to be of a certain class and had to conform strictly to regulations laid down by the Board of Trade, insurance companies, etc. They had to travel direct to England without calling anywhere else en route and had to travel at specified speeds; but most important of all, they had to maintain a regular service. The steamers had to leave on schedule irrespective of whether they were fully loaded or not, and immediately a boat left its loading berth in Alexandria, another one had to be ready to take its place. Steamers had to be kept constantly on the berth for Liverpool and Manchester. In order to maintain this schedule it had often been found necessary for steamers to return from Manchester at high speed and in ballast only. Shippers and spinners could therefore be certain that, when a definite time for shipment was specified in their cotton contract, the shipping company could be relied upon to ship the cotton at the time appointed.

Such conditions did not prevail with regard to shipments to other countries. The service to Japan was erratic, and no definite schedule existed. Freight had to be booked long in advance, and the steamers called at Port Said. There were more steamers on

the Indian service but this service was not so good as that offered to Liverpool and Manchester.

He trusted that he had made the position quite clear to his spinner friends. The shipping companies had just held a conference in London, but they could not see their way to make the service any cheaper at the moment.

Mr. CARVER supplemented the previous speaker's statement by adding that steamers in the slack season sometimes left Alexandria for Liverpool and Manchester, almost empty, in order to maintain the schedule.

Mr. DUTTON expressed his complete satisfaction at the replies given by Ali Bey Emine Yehia and Mr. Carver.

At this stage, the resolutions were submitted and approved. Those relating to the humidity agreement, Standards for Grades of Egyptian cotton and Uniformity of Cotton Contract Bases, have already been given. In addition the two following resolutions were approved unanimously:—

UNIFORM METHOD OF TESTING FOR MOISTURE IN EGYPTIAN COTTON.

"That the General Secretary be instructed to invite representatives of all official cotton testing houses to attend the next International Cotton Congress, to be held in Egypt in December, 1937, for the purpose of establishing a uniform method of drawing samples, of testing for moisture and of issuing moisture test certificates for Egyptian Cotton. These delegates would have the opportunity of inspecting the cotton testing house at Alexandria, able to handle if need be the whole of the Egyptian Cotton Crop."

OBSERVANCE OF HUMIDITY AGREEMENT.

"It was resolved that the General Secretary shall circularize all affiliated spinners' associations to the effect that the latter should impress upon their members the need for a strict observance of the terms of the Egyptian Humidity Agreement."

ELECTION OF PRESIDENT AND VICE-PRESIDENT.

Dr. VAN DELDEN stated that he had great pleasure in proposing that Mr. William Heaps be elected President of the Joint Egyptian Cotton Committee for the ensuing term of office. Mr. Heaps had always taken a very keen interest in all the questions which had occupied the attention of the Committee since the Committee's inception.

HIS EXCELLENCY AHMED ABDEL WAHAB PASHA seconded the proposal, which was carried with acclamation.

Mr. HEAPS suitably acknowledged the honour which had been conferred upon him. He stated that he had been engaged in the handling of Egyptian cotton for 56 years. Notwithstanding the differences which had sometimes arisen in the Committee the latter had always accomplished its work in a spirit of harmony, and he trusted this would always be so.

The CHAIRMAN congratulated the new President and thanked the Committee for the assistance which they had given him during his term of office.

The chair was then taken by Mr. Heaps.

On the proposal of HIS EXCELLENCY AHMED ABDEL WAHAB PASHA, seconded by Mr. WIGGINS, it was unanimously decided to appoint FOUAD ABAZA BEY as Vice-President of the Joint Egyptian Cotton Committee for the ensuing year.

FOUAD ABAZA BEY suitably acknowledged the honour.

DATE AND PLACE OF NEXT MEETING.

It was decided to hold the next meeting of the Committee in Cairo, simultaneously with the holding of the next International Cotton Congress there in December, 1937.

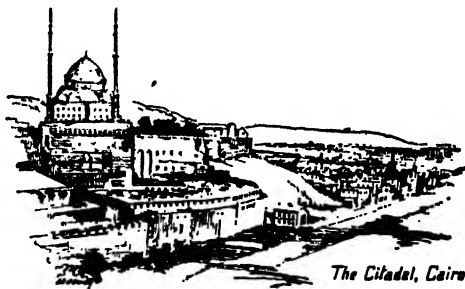
Mr. CATTERALL proposed that a hearty vote of thanks be conveyed to His Excellency Ahmed Abdel Wahab Pasha for the efficient manner in which he had presided over the meeting. This was carried with acclamation.

HIS EXCELLENCY AHMED ABDEL WAHAB PASHA suitably thanked Mr. Catterall and the other members of the Committee for their kindness, and stated that he had always found it a pleasure to work with them.

Mr. PALMER, on behalf of Mr. Taylor and himself, expressed his thanks to the Committee for having bestowed upon them the privilege of attending the meeting.

The meeting terminated at 12.30 p.m.

Papers prepared for the Committee Meeting will be found in the Appendix overleaf.



The Citadel, Cairo

Water-Weight-Changes in Export and Country Bales.

Resumé of Paper presented by Dr. W. L. BALLS, C.B.E., F.R.S.

Perhaps the most striking fact of practical value is the ease with which atmospheric moisture can enter or leave the bale, as compared with the difficulty of entry for liquid water.

The next is the physical impossibility of ever measuring the weight of a bale exactly, even under the conditions—impossible in practice—of its having been stored for a period of six months or so in an atmosphere whose humidity does not vary 5 per cent. Even under the exceptional conditions of our Spinning Test Mill we could not attain stability.

The nearest approach to stability is probably attained when a large number of bales are stowed in a confined space, such as the hold of a ship, which, even though it is not hermetically sealed, does not admit fresh air except with difficulty.

The hysteresis loop of the curve which expresses the relation between weight and atmospheric humidity is also seen to have practical significance. Exposure of some months to R.H. 68 per cent. brings the bale to a moisture-content of 7.8 per cent., as predicted by the curve, *if* it is a dry bale which is getting damper. But if it were a wet bale becoming dryer during storage, it would not become dryer than about 8.8 per cent. Thus, even if air-conditioning plant were used in cotton warehouses, the moisture content of the bales they contained would vary through this range according to their previous history. This range might be less in a hot warehouse than in a cool one, assuming both to be kept at the same relative humidity.

We are still inadequately informed as to the amount of variation in moisture-content which can exist between concentric layers within a bale, and as to the rapidity with which interchange of moisture can take place between them. We have learned, however, that concentric layers of different content from opposite sides of the hysteresis loop can co-exist stably, which makes all methods of electrical measurement impossible, except possibly those employing a central electrode.

The behaviour of the soft and bulky country bale has been found to be less unlike that of the export bale than one had expected. Probably the greater distances through which moisture has to travel between the centre and the exterior have the effect of balancing out the easier passage through the larger "capillaries" of the soft bale.

It is evident, as the actual experience of the Alexandria Testing House has shown, that very marked differences in moisture-content may be developed between different bales of the same shipment during a week's journey. For instance, on a river-transport barge, the rows of bales exposed to the sun will approximate more quickly to the mean humidity on the river than those in the centre of the shipment, while those at the bottom of the pile may become heavier by absorbing bilge-water vapour, or moisture from the underlying cargo of cotton-seed.

An examination of the data provided by 10,000 bales tested by the A.T.H. during 1934-35 showed that there was a curious lag in the effect of weather conditions. An exceptional spell of the hot and dry "khamseen" weather from May 23 to June 2, 1935, provided a unique opportunity for observing this. During the khamseen itself the test-results were normal; next week we received several bales which were $\frac{1}{2}$ per cent. dryer than usual; another week provided some which were 1 per cent. dryer, and a month after the khamseen began we received several which were as low as 6 to 7 per cent. Further study of the data in the light of this unexpected result showed a similar time-lag for abnormally wet-bales, so that the wettest bales arrived for test some three months after the wet season, with a steady

progression of intermediates as before. It looks as if this lag was a measure of the time taken in transport from the interior of Egypt to Alexandria, and our weighings tend to substantiate this, because the bales are more freely exposed, and ventilated by moving air, when in transport than when stacked together in storehouses.

We confirm, of course, the fact already well-known, that the construction of a storehouse, and especially of its floor, must have a marked effect on the weight of bales stored therein, through the action of atmospheric humidity.

Copy of the complete Paper may be obtained from the Giza Research Board, Cairo.

The Alexandria Testing House— Progress Report, 1935.

I.—REPORT OF PROGRESS DURING THE YEAR 1935-36.

Since the last Progress Report the Alexandria Testing House has shown a marked increase in all its activities.

This is particularly so in the Department dealing with humidity tests on hydraulic cotton lots arriving on the Alexandria Cotton Market from the Interior. Tests on steam-pressed bales for spinners abroad have also increased.

The following is a comparative statement of tests carried out during the period September to April for the last two years :—

Year 1934/1935			Year 1935/1936		
September	390		September	781	
October	529		October	1,940	
November	686		November	1,976	
December	446		December	2,049	
January	1,107		January	1,736	
February	1,847		February	1,722	
March	1,654		March	1,613	
April	1,251		April	1,670	
Total	7,910	Tests	Total	13,487	Tests

These 13,487 tests represent approximately 111,000 bales tested during 1935-36.

Details of the various kinds of tests carried out are as follows :—

HYDRAULIC BALES (local tests)

Conditioned	11,918	
Delivered	329	
Drawn	79	
	<hr/>	12,326

STEAM PRESSED BALES (Export)

Conditioned	1,110	
Drawn	51	
	<hr/>	1,161
Total		13,487 Tests

Considering the crop at approximately 8,274,000 cantars and taking the hydraulic bale at an average of 8.5 cantars, we estimate having tested 11.4 per cent of the crop.

The most noticeable feature in the increased demands for humidity tests is the large increase in the number of merchants and exporters using the Testing House.

In the early years of the development of the Testing House its clients were limited to a comparatively small number, and it is encouraging to note that practically all merchants and exporters now have regular and in many cases daily recourse to the Testing House.

This may be taken as definite evidence of increasing degree of confidence which the local cotton market has in this Institution.

II—HUMIDITY PERCENTAGE GRADES.

Out of the 13,487 tests carried out from September 1, 1935, to April 30, 1936, the following statement gives the various groups of humidity grades, classified in the same way as on page 8 of the 1934 Progress Report.

Humidity Percentage Grades	Number of Tests	Percentage to Total Tests
6 to 8	679	5.04
(Standard) 6.1 " 8.9	3,108	23.05
9 " 10	7,422	55.03
10.1 " 12	2,237	16.58
12.1 and over	41	.30
Total ..	<u>13,487</u>	<u>100</u>

It must be understood that as testing is not compulsory in Egypt, many allowances were settled amicably under the Magasinier-Expert method, and therefore the statement cannot be taken as representing the condition of the whole crop.

It will be observed that high humidity percentages this year are much less common. This it is presumed is due to the existence of the Testing House, and should the improvement noticed in this connection be maintained it will undoubtedly improve the standard of the Egyptian crop as a whole.

III—EQUIPMENT.

The premises of the Alexandria Testing House have been greatly extended and modernized under the expert supervision of a Technical Adviser. The installation now comprises 18 ovens with a working capacity of 300 tests per diem. Enough space has been made available to increase the number of these ovens should the demands for tests continue to increase at its present rate.

The conditioning ovens, balances, motors and fans are regularly overhauled by expert mechanics.

The boxes of weights in use are also regularly checked with a set of gold-plated master weights duly certified by the Physical Department of H.E.M.'s Government.

IV—HANDLING OF SAMPLING, ETC.

It must be clearly understood that the various stages of testing, from the drawing of samples to the drying process and preparation of certificates, are entrusted to different members of the Staff in different Departments. This procedure is insisted upon by the managers in order that risks of error or irregularity may be obviated.

V—SUPPLEMENTARY ACTIVITIES.

The Alexandria Testing House, apart from the normal work on moisture, also acts as intermediary between exporters and spinners in the way of drawing cotton samples for type and staple.

Samples are drawn by the Testing House Staff by approved methods and despatched to the spinners. Pending acceptance or rejection by spinners of the samples submitted to them, the cotton lots under offer are sealed and kept under the observation of Testing House officials. This branch of the work is carried out by a specially trained staff, and has so far proved very satisfactory to both parties.

The Management has now under consideration the question of developing the services rendered to the cotton industry in general.

It is proposed to organize and equip a special laboratory for the purpose of carrying out special tests in connection with the estimation of the quality of various cotton types. These tests are already being called for by certain merchants and exporters on the cotton market, and are being carried out for them at present at the spinning test mill at Giza (Cairo).

The Testing House will, it is hoped, shortly be able to offer facilities in connection with investigations into the causes of rejection of cotton lots or complaints by spinners.

GENERALLY.

The marked improvement in the demands for tests is reflected in the improved financial situation of the Testing House. However, a still further increase in the number of tests is required to place the Testing House on a sound financial basis, and if the present improvement continues the next two years should cover the deficiencies experienced in the first year's development of the Institution.

The lack of interest in testing in Alexandria is still most noticeable on the part of spinners, mainly due, it is supposed, to the fact that spinners have not yet troubled to investigate the advantages to be gained by testing in Egypt. The Managers are always willing to give any prospective spinner clients the fullest information on the methods employed in the Testing House and on the facilities afforded in connection with humidity tests at port of embarkation. That these advantages are real is shown by the fact that those spinners who have realized the advantages of Alexandria Testing House have now become regular clients of the establishment.

Moisture Tests on Egyptian Cotton.

TABULATION NO. 11

Report prepared by N. S. PEARSE, General Secretary, International Cotton Federation, Manchester, for the Meeting of the Joint Egyptian Cotton Committee, Sils-Maria, July 27, 1936.

The present tabulation refers to the results of those tests received at the Head Office since the last tabulation was prepared for the Meeting of the Joint Egyptian Cotton Committee, held in connection with the Milan and Rome Congress, in April and May, 1935.

A large number of tests have been received, namely 923, referring to 60,666 bales. The weighted or true average moisture percentage for these tests is shown in the tabulation as 9.47 per cent. This figure compares with the previous tabulations as follows :—

Submitted at Zurich, June 1928	..	..	9.051%	moisture content
" " Brussels, May, 1929	..	..	8.960%	" "
" " Barcelona, September, 1929	..	..	9.486%	" "
" " Stresa, May, 1930	..	..	9.475%	" "
" " Cairo, January, 1931	..	..	8.830%	" "
" " London, February, 1932	..	..	8.760%	" "
" " Windermere, July, 1932	..	..	8.899%	" "
" " Prague, June 1933	..	..	8.963%	" "
" " Cairo, February, 1934	..	..	8.800%	" "
" " Milan, April-May, 1935	..	..	9.23%	" "
Now the figure is	..	..	9.47%	" "

Tests were received relating to 25 different shippers, but only two of these shippers succeeded in shipping below 8.5 per cent., the recognized standard of moisture for raw cotton, and only six shippers averaged below

8.9 per cent., i.e., 19 shippers out of the total of 25, shipped their cotton last season with an average moisture content of over 8.9 per cent.

Shipments varied between 6.88 per cent. and 11.66 per cent., but as will be seen from the following tabulation, the preponderating proportion of the shipments, namely 58.83 per cent., fell between 8.9 per cent. and 10 per cent of moisture content.

Shipments Per cent.	No. of Shipments	Percentage of Total Shipments
Under 7	2	.22
7—8.1	22	2.38
8.1—8.5	60	6.50
8.5—8.9	155	16.79
8.9—10	543	58.83
10—11	134	14.52
Over 11	7	.76
	<u>923</u>	<u>100.00</u>

9.10

74.11

A certain number of shippers are sincerely endeavouring to ship between 8.5 per cent. and 8.9 per cent.; these shipments falling under this category are 16.79 per cent., but the high percentage of shipments, 74.11 *per cent. above 8.9 per cent.*, shows that a large proportion of the Alexandria shippers are still damping the cotton excessively. Only 9.10 per cent. of the shipments contained moisture below 8.5 per cent.

ANALYSIS OF TESTS TAKEN FOR MOISTURE IN
EGYPTIAN COTTON.

	No. of Tests taken	No. of Tests under 8.5% (dry)	No. of Tests over 8.5% (wet)	No. of Bales	Under 8.5% Dry	Over 8.5% Wet
1.	1	1	—	35	7.76	—
2.	4	1	3	195	8.13	—
3.	2	1	1	200	—	8.53
4.	24	5	19	943	—	8.65
5.	55	21	34	2,314	—	8.72
6.	12	3	9	270	—	8.83

TOLERANCE LINE

7.	91	13	78	2,742	—	8.98
8.	16	3	13	543	—	9.07
9.	59	6	53	2,024	—	9.12
10.	51	9	42	3,565	—	9.33
11.	5	—	5	300	—	9.35
12.	1	—	1	10	—	9.37
13.	17	1	16	675	—	9.38
14.	13	1	12	486	—	9.40
15.	40	5	35	4,567	—	9.56
16.	460	11	449	34,298	—	9.57
17.	1	—	1	10	—	9.57
18.	20	—	20	2,648	—	9.58
19.	13	1	12	591	—	9.59
20.	6	—	6	480	—	9.59
21.	6	1	5	759	—	9.77
22.	4	—	4	102	—	9.84
23.	13	—	13	2,538	—	9.88
24.	1	—	1	125	—	10.37
25.	8.	1	7	246	—	10.39

923 84 839 60,666

Weighted
Average .. 9.47

Egyptian Cotton Contract Bases.

The following extract from the *Egyptian Gazette* indicates that the difficulties which have been apparent for some time in the Liverpool Market are equally experienced on the Alexandria Exchange, and for a considerable time a committee has been sitting in Liverpool to make the futures contract broader and more convenient to work.

"It has long been felt that the present contracts are ill-adjusted to the altered needs of the market, arising partly from the marked improvement in the average grade of recent crops and partly from the radical changes which have taken place contemporarily in the proportionate production of the leading varieties. Various suggestions have been put forward to meet the problem, but, as far as Alexandria is concerned, the proposals which appear to have found favour with the majority of traders were the following, which were adopted almost unanimously at an extraordinary general meeting of members of the Minet-el-Bassal Spot Exchange :—

- (1) That, for the existing Sakel and Uppers contracts there should be substituted a 'long-staple' contract, and a 'medium-staple' one, the basic variety in each case being the lowest priced cotton on the tenderable list in the respective categories at the time of delivery, and
- (2) That the basic grades of the two new contracts alike should be Fully Good Fair/Good instead of Fully Good Fair.

It is understood that these recommendations have been passed on for the consideration of the Alexandria Futures Exchange Commission, after which it is assumed that they will be submitted to the Government.

The introduction of contracts on these terms in place of the present ones should certainly tend (under normal conditions of demand) to bring futures prices more closely into line with spot rates than they have been for a long time past. It should also tend to establish the theoretically normal relationship between futures months in which near options would stand at that discount under succeeding ones which would represent the cost of carrying cotton over the intervening period. Speculative interests are in no position as a rule to take up cotton against contract holdings. Under present conditions operators are usually concerned to maintain their near month positions until the eleventh hour in order to profit by the large differences resulting from the impracticability of tendering. If the relationship of futures and spot were such as to make delivery against hedges a commercial proposition, the effect would be to induce bulls to carry forward their accounts from the proximate deliveries well in advance of their maturity."

The attention of the Committee has been chiefly devoted to the Sakellarides Contract, which, owing to the scarcity of tenderable cotton, has been subject to the attacks of speculators who have been able to manipulate the market to the disadvantage of spinners. The basis of the new contract is to be Giza 7, with protective clauses introducing certain other long-staple varieties as tenderable against the contract.

The more important contract from the spinners' standpoint is the C.I.F. contract, for delivery of actual staple. English spinners do not often take up dockets, but a very large business is done against known marks of cotton. The Liverpool C.I.F. contract is very carefully drawn up, and it would be a mistake to alter it in any material point. Any attempt to make C.I.F. cotton purchases acceptable, subject to allowances, would be a great mistake. At the same time, the clause providing for arbitration, re-tender and re-sale to the seller or rejection of a second tender, should be carefully maintained.

A spinner has to produce a certain type of yarn, which the buyer of such yarn expects to meet his requirements, whatever may be the quality of any

particular crop from which the yarn is spun, and the basis of any C.I.F. contract should be that bearing a mark representing a definite style of cotton. Such type should be invariable whatever may be the crop. The experience of spinners has not always been fortunate in this respect, and a buyer is often told that owing to the special crop conditions the quality of the cotton represented by the mark varies accordingly. If the basis of a C.I.F. contract could be the quality which the spinner thinks he has bought, it would save him many anxious hours. There are fortunately many shippers who make this point a matter of conscience in dealing with their merchants, and the implied agreement which cannot be framed in any contract is honoured by them.

Progress Report on the Spinning Test Station at Giza.

By H. A. HANCOCK, Ministry of Agriculture, Egypt.

The Spinning Test Mill at Giza, which commenced operations last year, has now nearly completed its first full season, in the course of which over 500 samples have been subjected to spinning tests apart from a number of "micro" spinning tests. The spinning technique outlined in the 1935 Progress Report to this meeting has proved rapid and convenient, and the accuracy of the testings has been checked up in various ways and found to be satisfactory. For instance, series of varieties grown in different localities give closely parallel results, as do first and second pickings of the same varieties grown in one chequer. In addition to checks of spinnings one against the other in our own mill, a series of 42 samples grown in various localities were halved—taking precautions to obtain good sampling—and one-half of each sample was spun at Manchester into 80's and 100's combed, while the other half of each sample was spun into 60's and 100's double carded by our standard technique at Giza. Taking the average of the four spinnings as the correct evaluation for each sample, it was found that the spinnings of 60's double carded at Giza gave such closely parallel results that not a single sample was placed out of the correct order in any of the eight groups into which the samples were classified.

General parallelization between spinnings of carded and of combed yarns was not unexpected, but such close agreement had hardly been hoped for, since of course the strength level is considerably higher with combed yarns. A further half-dozen samples were similarly spun at the two places, but without special precautions being taken in sampling, and deviations of one or two per cent. then became apparent between the two sets of spinnings. Since important decisions sometimes depend on differences no greater than this, the necessity for the best possible sampling in spinning test work is once more demonstrated. The general practice at Giza in abstracting a small sample from a larger is to divide the latter into 20 parts, taking a little from each part, and this method is found to give consistent results.

In view of the consistency of the results, and as the mill staff grew expert in the handling of 5-lb. samples, we were encouraged to reduce the size of the spinning test sample, to 1,000 grams (2½ lbs.), although for the time being the precaution is being taken to sample from larger amounts until the degree of variation due to sampling is evaluated. All our spinnings are now conducted on samples of this size, leaving a larger proportion of the breeder's samples over, for grading and inspection by interested parties in Europe.

A novel technique for the spinning of very small samples has also been developed, for circumstances where the amount of material is limited and only low accuracy is called for, as in rejecting the poorer half of a number of new hybrid cottons of unknown value.

Only 100 grams of cotton—a small handful—are used in these microscopic spinning tests. It is found possible to subject these forlorn 100

grams to two carding processes, a wrapping, and one head of drawing; and to spin two leas of 30's yarn from it on to each of four bobbins. Only about 30 grams of the original 100 reaches the spinning frame, which is the new Compound Spinner of Casablanca and spins direct from draw-frame sliver with a draft of over 100. The standard error of a single spinning test under these conditions, but using well-sampled material, is less than 10 per cent., and three men can put through over 100 samples in a week, using only a carding engine, a drawframe, and a spinning frame. Such methods have value in special circumstances only, and of course cannot be used for tests having any claims to precision.

Besides the examination of the Plant Breeding Section's multitudinous collection of new cottons, two large-scale series of spinnings by the standard technique have been undertaken during the year. These are the investigation of mixings of all the different varieties of Egyptian cotton—whether known to commerce or not—and the tabulation of yarn strength and staple characters of all the main commercial Egyptian cottons in two grades.

The technical literature seems to be entirely lacking in information about these subjects, and although many practical men must have acquired a good working knowledge of mixings, they apparently keep their information to themselves. With all the facilities afforded by a cotton-breeding farm close at hand, our spinning mill is peculiarly competent to deal with this problem, and the effect of the various combinations of hair strength, length and weight and grade in mixings is being studied.

Although the tabulation of commercial cottons is not yet completed, definite results of considerable importance have already been obtained. It is found that the relative price of each of the long-staple varieties is in the long run closely proportional to its yarn strength, plus some basis dependent upon economic conditions. This generalization holds whatever the staple length, lustre, colour, or grade. The most important feature about a cotton in the spinner's eyes is apparently the number of pounds it will register on his lea-testing machine, and he is prepared to pay only comparatively small premiums for anything else. Incidentally, this discovery justifies the yarn-testing method for determining the commercial value of new varieties; the values are given by the lea products.

It is also found that the taker-in waste of a cotton is an accurate inverse measure of its grade as estimated by the graders at Alexandria, and generally speaking yarn strength is inversely proportional to grade as shown by the following series of graded Giza 7's:—

Grade	F.G.F.	F.G.F./G.	G.	G./F.G.	F.G.
Taker-in waste %	7.1	5.8	5.0	4.6	4.1
Lea Product in 60's	2210	2260	2315	2485	2530

Figures such as these are a striking testimonial to the Alexandria merchant's skill in placing cottons for grade, but he does not appear to be quite so generally successful in placing cottons for strength.

Some light has been thrown on the quality of low grade Sakels, about which spinners have been complaining for some years. There is found to be a bigger difference in strength between F.G. and F.G.F. with Sakel than with any other variety, and the cause is probably to be ascribed to damage by cotton-worm. The defect lies in the F.G.F., for F.G. Sakel appears to be as good as ever it was. The price of F.G.F. Sakel has responded to its quality, and there is a correspondingly large margin between F.G. and F.G.F. prices; that is to say, the spinner pays for strength in Sakel F.G.F. at very much the same rate as he pays for strength than any other long-staple Egyptian variety.

Sakel is now definitely vanishing from the Egyptian market, and the only question is how long the process will take. When this Federation holds its meeting in Cairo next year, the Ministry of Agriculture will show cottons which are from 5 per cent. to 10 per cent. stronger than the best Sakels that ever came out of Egypt, grade for grade, and there is no reason to think that the trade will be unable to obtain the high strength cotton to which they are accustomed, through the passing out of the Sakel variety.

* 5-lb. samples are fed without any previous cleaning to an all-Roubaix wire card, carded a second time, give three heads of drawing and three speed frame operations, and ring spun from double roving, using Casablanca's system at all drafts after the drawframe.

The Effect of Jute on the Spinning Value of Cotton.

By W. LAWRENCE BALLS and H. A. HANCOCK.

In the report to the Rome Congress of 1935 we gave the results of tests devised to ascertain how much additional cost of production resulted from jute-handling as compared with all-cotton handling in the field, ginnery, and baling presses. It was concluded that one-twentieth of a penny per pound was added to spinning costs by the presence of these traces of jute, an amount which, though small, is equal to the extra cost of cotton handling.

In the present account we propose to deal with another aspect of the matter, namely the depreciation in strength, and therefore in value, of the product. This it has been possible to do in the Spinning Test Mill at Giza with high precision under our particular conditions. The previous study of production cost, on the other hand, being based essentially on statistical studies, could only be done under industrial conditions.

With high-grade cotton to which jute is added, we have found that there is a small depreciation in the value of the yarn, to which we are able to assign a definite value in points of a penny per pound from the results of other studies done at Giza. It is clear that this must be added to our previous figure, the position being that a spinner whose costs of production have been increased by five penny points due to the presence of jute, and has thereby produced yarn which is worth, say, one penny point less, will lose a total of six penny points per pound of yarn sold.

The results of our experimental spinnings were most surprising, and seem at first sight to deny the spinners' claims about the deleterious effects of jute. The jute was obtained by scraping the surface of jute bags, and consisted of fibres and fluff averaging less than half an inch in length, but occasionally much longer. The principle of *reductio ad absurdum* was applied in designing the experiments, and the six sets of spinnings of the first group tested were made up to contain 0 per cent., $\frac{1}{8}$ per cent., $\frac{1}{4}$ per cent., $\frac{1}{2}$ per cent., 1 per cent., and 4 per cent. Although the cotton used was of exceptionally good staple and grade, being Fully Good Sakel, we reasonably expected that the 4 per cent. jute mixing would be quite unspinnable, and only included it in order to define the upper limit of jute content; but actually it spun very well.

It may help to define the significance of these percentages if we note that the jute tare of an export bale is approximately $\frac{1}{2}$ per cent. of the bale weight, so that if the whole bale cover were fed along with the cotton in the blowing room, this would be less drastic than our last two mixings. At the other extreme we have reason to think that the normal jute-contamination in cotton which has been carefully handled is less than 0.01 per cent., this amount coming mostly from the sacks in which the seed cotton is placed; this is less than the amount of jute in our most dilute mixture.

The results of these six spinnings are shown in Fig. 1, the strengths being expressed as the product of lea strength by counts. No great reduction of strength is found, and compared with depreciation which can occur due to a drop in grade for instance, the magnitude of the strength depreciation due to jute is trivial. A drop of one grade from Fully Good down to Good represents a drop of 200 or more in the lea product at 60's; whereas the addition of $\frac{1}{8}$ per cent. of jute, which is almost certainly more than occurs in Egyptian bales, only reduces the lea product by 35. We estimate that this depreciation in strength reduces the value of the bale by about three shillings.

Another point of interest is the form of the curve relating jute-percentage to yarn-strength. It is the reverse of our expectation, which was that minute amounts of jute would weaken the yarn minutely, but that each successive increase in that amount would weaken the yarn more and more,

until 4 per cent. jute would be unspinnable. Actually the reverse relation holds, and minute amounts of jute have the biggest relative effect.

The admixed jute persisted through the carded preparation right up to the ring-frame in approximately the same relative proportions as were originally added; this was shown by collecting the jute fibres falling around the thread guides at each spindle. Some of the jute was removed at the card, but the taker-in waste figures show that more than half the added jute remained in the cotton. Spinnings at both 60's and 100's (3.6 twist factor) were entirely trouble free, and even 100's the number of breaks during spinning only amounted to about 9 per 100 spindle-hours, the 4 per cent. not being distinguishable from the other mixings. This in spite of the fact that the roving bobbins of the 4 per cent mixings were recognizable from a distance of several yards by their speckled brown appearance.

In view of this rather surprising result, a second series of spinnings was undertaken on a lower grade cotton, a Giza 7 of grade Fully Good Fair. This sample had been cotton-handled throughout and had never been in contact with jute. As perhaps might have been expected, the addition of jute had even less effect at low grade; and in fact we were unable to measure the effect at the low percentages tested, although the heavier mixing still contained more jute than normally occurs in Egyptian cotton. The spinnings of the Giza 7 F.G.F. gave the following results:—

Percentage jute added ..	None	1/256%	1/64%
Lea Product at 60's ..	2445	2440	2465

With either grade of cotton, therefore, our spinnings indicate that jute added in the small quantities estimated to be normally present has a very small effect on yarn strength.

We hesitate to say to what extent our results apply to normal industrial conditions, for it is possible that our deviations from ordinary spinning practice are such that jute fibres disturb our processing less. It is also uncertain if the common assertion that jute causes bad spinning implies a reduction in yarn strength as well as an increase in ends down during spinning. The Spinning Test Mill differs from most commercial mills not only in its very stable atmospheric conditions, but also in its use of Casa-blanca's Drafting System with low drafts at all three speed frames and medium drafts at the spinning frame, and the use of cork roller-covers from the drawframe onwards. Both 60's and 100's were spun from 8-hank roving on 1½-in. rings at a spindle speed of 8,000 r.p.m. That the processing is satisfactory may be seen from the lea product of over 3,000 obtained from the control Sakel at 60's, using only a double-carded preparation without combing. Under these particular conditions of efficient drafting we can say definitely that the effect of small amounts of jute is almost negligible and even the increase from 1 per cent. jute to 4 per cent. jute depreciates the yarn strength so little that it looks possible to continue the curve to include much more jute without breakdown.

A Note of the Outlets for Egyptian Cotton by Countries and Varieties.*

By M. ALI YEHIA.

A study of the outlets for Egyptian cotton, country by country, is of interest not solely from the standpoint of our trade in this article but also in so far as the general commercial policy of our Government is concerned.

With this in mind, the data forming the subject of this paper have been collected with an eye to a broad and general view. It has therefore been

* Statistics of Egyptian exports by countries and varieties for the years 1932-33, 1933-34, 1934-35, and for the current season up to May 21, are attached.

necessary to draw comparisons between the present consumption of our customers as against that of pre-war years, and to consider the factors that have led to variations, in cases where these occur.

One must, in the first place, make allowances for territorial changes resulting from the war. Once this factor is borne in mind, one can proceed with an analysis of each customer's takings. To maintain the general nature of this note, no actual figures are given, but only percentages of Egypt's total cotton exports in any particular year.

The United Kingdom has always been and still remains our best customer, but her relative importance has considerably diminished. At one time she took from 55 to 60 per cent. of our exports, and during the war (in 1917-18) her purchases amounted to 71 per cent. of our exports, but she subsequently lost considerable ground until, during the 1934-35 season, she took no more than 27 per cent. It must not be forgotten therefore, that published figures do not necessarily reflect actual consumption of our cottons in England, since Liverpool is an important spot market from which foreign buyers frequently secure supplies. Both America and the Continent buy in Liverpool from time to time, whilst, for some years after the war, Russia's supplies of Egyptian all came from that market. But this country completely ceased her purchases there when she opened up direct relations with us. Had this not been the case, the decline in English takings would doubtless have been more rapid, for the textile industry has been making great strides in other countries, notably in America, and especially in the Far East (India, China, and above all Japan).

During the current season though, there has been a satisfactory increase in English takings, which have moved up again to 35 per cent., thanks partly no doubt to the recent visit to London of the Egyptian Commercial Delegation and the restriction of Japanese takings as a result of the raising of our tariff barriers on Japanese goods.

France has at all times been a steady buyer of our cottons, and her percentage has gradually grown from 9 per cent. before the war to a figure varying between 12 per cent. and 18 per cent. in recent years. The increase is chiefly due to the annexation of Alsace with its advanced textile industry, and, on the whole, France can be looked upon as one of our most faithful and regular customers.

The case of Russia is obviously rather peculiar. Prior to 1914 her territory included Poland, with its many important mills, and at that time we sold Russia about 8 per cent. of our crop. During the war, as can be imagined, she was unable to continue her takings, and subsequently the change of regime for a long time prevented any direct relationships. During that period Russia secured her supplies in Liverpool, and it was not until 1923-24 that she made a timid beginning here, though she lost little time in vastly increasing direct purchases until they reached their peak in 1930-31 with 80,000 bales, equivalent to 8 per cent. of our crop. A rapid decline followed, and to-day Russia has practically ceased to show interest, having herself become a producer of Egyptian cotton from seed procured here.

The Austro-Hungarian Empire accounted, in pre-war days, for 5 per cent. to 6 per cent. of our sales abroad, and if we include all the countries that formerly made up the Dual Monarchy (Austria, Czecho-Slovakia and Hungary) we find that this figure has remained more or less stationary.

Italy in the past was one of our smaller outlets, taking barely 3 per cent. to 4 per cent., but the great development of her textile industry has reacted favourably on her takings, which, in a normal year, now vary between 8 per cent. and 9 per cent. During the present season business has, of course, been affected by sanctions and, in consequence, shipments to Italy have declined to about 5 per cent. It is, however, to be expected that an eventual change in the situation would lead to a reawakening of interest, though this might be somewhat restricted by currency difficulties.

Germany, of course, was always one of our best customers, taking from 8 per cent. to 10 per cent. of our crop before the war. The loss of Alsace naturally affected the position and, for a whole decade, her takings stood at only 4 per cent. to 6 per cent., but an improvement then set in, thanks to the reorganization of her textile industry, and in 1932-33 we shipped her some 13 per cent. of our crop. Unfortunately, currency difficulties have

rather handicapped business since then, dealings being now affected on special "compensation" terms. In other words, Germany's takings henceforth depend on our consumption of her exports.

For many years both before and after the war, Spain was only a minor outlet, accounting for 2 per cent. to 3 per cent. per annum, but in 1929 a gradual improvement began, and she now holds 6 per cent. rank. Reorganization of her textile industry is the cause.

Switzerland has been a very constant friend, with 4 per cent. her regular figure for many years.

A number of new European outlets have been secured of late. Sweden, for one, first nibbled at our Uppers cotton when American prices moved to too high a level, and she has maintained interest ever since.

Then we have Roumania, where prospects seem to be quite encouraging, as we, on our part, buy much from her, whereas the United States themselves produce timber and oil, which are Roumania's chief exports.

Prior to 1930-31, India made no showing on our export lists, but during that season the failure of the East African cotton crop led her to purchase as much as 8 per cent. (82,000 bales) of the Egyptian crop. Since then her takings have fluctuated violently in sympathy with East African conditions, varying between 2 per cent. and 7 per cent., but it seems certain that, apart from the ephemeral interest manifested by certain spinners, our growth have secured a firm footing in other Indian mills.

China is another post-war customer, small perhaps, but with a tendency to regular growth.

Japan, needless to say, is far and away our best buyer in the Far East. Prior to 1914 she regularly took about 2 per cent. of our annual production, but the war stimulated this market, and the tremendous advance in the Japanese textile industry (particularly in so far as fine yarns are concerned) reacted most favourably on her purchases, which rose in 1934-35 to 10 per cent., only to fall back this year to 8 per cent. as a result of our Government's tariff on Japanese cotton goods, destined to protect local industry. In view, however, of the somewhat similar action adopted by the United States, it is probable that the conclusion of an Egypto-Japanese treaty will be facilitated, and in that case we can again expect to increase our sales in that quarter.

The story of our cotton dealings with the United States is one of ups and downs. She first took real interest in our growths at the beginning of the war and promptly took a big place, buying 21 per cent. of our crop and increasing her takings to a peak of 35 per cent. Naturally, she thus became a leading factor in the tendency of Egyptian cotton values, but the imposition of the 7 cents tax on imported long staples killed the trade which revived when the tax was reduced, only to dwindle again to a mere 3 per cent. or 5 per cent. when the tax was re-imposed.

An outlet that is of growing importance is to be found at our doors, in other words, local consumption. This was of very little account before the war, but has grown considerably in recent years and accounts at present for some 5 per cent. of the crop, with a tendency to expand.

As will be seen from the bird's-eye view given above, outlets have been affected by a variety of factors. The principal conclusions we can draw therefrom are that the birth of new textile centres and the expansion of the old have a strong influence on the direction our exports take, and an outstanding feature has been the shifting of the centre of textile gravity (if such a term can be used) from the West to the East.

Then again, a large proportion of our crop has nowadays to be sold to countries who exercise some form of control, whether it take the shape of currency restrictions or of rationing. In consequence, the Egyptian Government will find much advantage in studying the possibility of concluding trade agreements with those countries which are willing and able to make use of our cotton. For figures speak, and the strongest argument in favour of such a policy is that cotton accounts for 85 per cent. of this country's exports.

EGYPTIAN COTTON

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SAKEL

Country	1932/33	Per cent.	1933/34	Per cent.	1934/35	Per cent.	1935/36*	Per cent.
England ..	937,217	50	987,890	48	423,532	37	286,279	36
France ..	219,948	12	246,122	12	127,272	11	104,437	13
Germany ..	63,136	3	87,857	4	88,115	7	42,822	5
Japan ..	102,043	5	87,261	4	122,883	11	79,926	10
Spain ..	56,851	3	66,791	3	58,013	5	37,892	5
Italy ..	106,225	5	157,749	8	92,088	8	84,694	10
British Indies ..	56,411	3	33,108	2	43,947	4	14,429	2
Czecho-Slovakia	32,483	2	46,958	2	44,529	4	53,891	7
Switzerland ..	37,809	2	34,608	2	34,410	3	17,741	2
U.S.A. ..	154,822	8	243,794	12	55,333	5	35,811	4
Poland ..	20,690	1	24,068	1	8,313	—	1,302	—
China ..	12,944	—	8,836	—	9,933	—	4,994	—
Austria ..	13,404	—	6,802	—	3,387	—	3,769	—
Hungary ..	4,123	—	2,260	—	3,676	—	847	—
Belgium ..	12,137	—	4,476	—	2,211	—	518	—
Sweden ..	413	—	1,377	—	2	—	75	—
Canada ..	—	—	—	—	—	—	—	—
Other Countries	8,418	—	9,962	—	9,761	—	11,215	1
TOTAL ..	1,839,074		2,049,919		1,127,405		780,642	

MAARAD

Country	1932/33	Per cent.	1933/34	Per cent.	1934/35	Per cent.	1935/36*	Per cent.
England ..	47,524	17	64,972	16	10,171	4	38,677	16
France ..	35,489	13	45,846	12	31,073	13	29,238	12
Germany ..	7,754	3	7,914	2	3,703	1	14,680	6
Japan ..	33,587	12	66,749	17	41,207	17	37,702	15
Spain ..	1,944	—	4,760	1	1,649	—	1,182	—
Italy ..	1,310	—	2,516	—	6,619	2	365	—
British Indies ..	49,957	18	47,236	12	26,796	11	25,027	10
Czecho-Slovakia	15,521	6	28,517	7	31,840	13	29,665	12
Switzerland ..	45,234	16	67,025	17	56,089	23	42,125	17
U.S.A. ..	3,528	1	10,318	3	2,794	1	9,507	4
Poland ..	18,304	7	34,608	9	8,556	4	11,032	4
China ..	—	—	—	—	2,537	—	—	—
Austria ..	—	—	145	—	8	—	262	—
Hungary ..	440	—	—	—	—	—	—	—
Belgium ..	1,423	—	671	—	220	—	—	—
Sweden ..	—	—	—	—	111	—	—	—
Canada ..	—	—	743	—	6,612	3	1,493	—
Other Countries	12,203	5	8,281	2	9,252	4	4,796	2
TOTAL ..	274,268		391,857		239,237		245,751	

* Up to 21st May, 1936.

EGYPTIAN COTTON

GIZA 7.

Country	1932/33	Per cent.	1933/34	Per cent.	1934/35	Per cent.	1935/36*	Per cent.
England ..	52,445	44	110,952	36	219,612	25	369,631	34
France ..	16,050	13	52,508	17	59,440	7	78,989	7
Germany ..	11,019	9	32,146	10	80,161	9	126,945	12
Japan ..	8,587	8	1,618	—	33,964	4	33,768	3
Spain ..	99	—	4,114	1	18,918	2	23,378	2
Italy ..	5,169	4	16,802	5	22,132	2	15,217	1
British Indies ..	10,022	8	30,754	10	255,590	29	179,476	17
Czecho-Slovakia	1,665	1	1,821	—	14,964	2	30,382	3
Switzerland ..	3,429	3	24,382	8	41,528	5	31,122	3
U.S.A. ..	180	—	21,405	7	86,777	10	118,268	11
Poland ..	1,008	1	789	—	20,331	2	19,903	2
China ..	2,942	2	891	—	14,886	2	22,133	2
Austria ..	168	—	2,314	—	222	—	5,666	—
Hungary ..	—	—	—	—	780	—	409	—
Belgium ..	433	—	368	—	4,192	—	4,518	—
Sweden ..	—	—	149	—	815	—	1,354	—
Canada ..	—	—	4,391	1	3,720	—	4,348	—
Other Countries	5,968	5	5,833	2	5,520	—	9,671	1
TOTAL ..	119,184		311,237		883,552		1,075,078	

ASHMOUNI & ZAGORA

Country	1932/33	Per cent.	1933/34	Per cent.	1934/45	Per cent.	1935/36*	Per cent.
England ..	1,014,037	28	1,977,365	34	1,335,985	26	1,457,072	34
France ..	628,974	18	676,146	12	687,081	13	685,867	16
Germany ..	575,420	16	831,263	15	411,570	8	378,657	9
Japan ..	216,122	6	402,370	7	585,635	11	301,472	7
Spain ..	209,474	6	273,508	5	405,248	8	313,950	7
Italy ..	351,975	10	507,802	9	564,511	11	231,994	5
British Indies ..	1,806	—	115,008	2	230,012	4	94,309	1
Czecho-Slovakia	93,981	3	127,916	2	137,324	3	135,656	3
Switzerland ..	125,201	4	147,565	3	171,254	3	127,510	3
U.S.A. ..	120,474	3	193,163	3	90,509	2	50,531	1
Poland ..	50,949	1	111,777	2	120,706	2	92,118	2
China ..	28,874	—	88,884	2	76,300	1	66,807	2
Austria ..	25,619	—	53,319	1	70,339	1	71,190	2
Hungary ..	10,236	—	44,948	—	78,559	1	58,515	1
Belgium ..	12,425	—	32,786	—	77,916	1	43,673	1
Sweden ..	12,689	—	36,111	—	38,028	—	37,157	1
Canada ..	—	—	29,692	—	32,419	—	22,888	—
Other Countries	51,525	1	67,340	1	169,961	3	176,394	4
TOTAL ..	3,529,781		5,716,963		5,283,357		4,300,760	

* Up to 21st May, 1936.

OTHER VARIETIES

Country	1932/33	Per cent.	1933/34	Per cent.	1934/35	Per cent.	1935/36*	Per cent.
England ..	173,441	30	177,256	34	163,833	37	187,188	52
France ..	63,308	11	40,395	8	41,048	9	58,747	16
Germany ..	155,419	27	133,555	25	60,242	14	33,425	9
Japan ..	27,242	5	29,414	6	29,085	7	20,096	6
Spain ..	22,993	4	21,798	4	9,313	2	6,627	2
Italy ..	17,669	3	14,475	3	8,056	2	6,118	2
British Indies ..	16,572	3	20,217	4	38,334	9	5,871	2
Czecho-Slovakia	14,764	2	16,448	3	15,677	4	2,164	—
Switzerland ..	22,434	4	17,306	3	13,664	3	6,930	2
U.S.A. ..	3,307	—	6,363	1	19,500	4	7,636	2
Poland ..	3,557	—	7,670	1	21,145	5	12,397	3
China ..	27,448	5	9,152	2	740	—	8	—
Austria ..	690	—	3,407	—	3,462	1	965	—
Hungary ..	226	—	1,676	—	3,511	1	659	—
Belgium ..	1,120	—	446	—	6,628	1	3,288	1
Sweden ..	4,198	—	—	—	2	—	2	—
Canada ..	—	—	3,718	—	1,482	—	735	—
Other Countries	19,791	3	23,725	4	5,663	1	4,585	1
TOTAL ..	574,179		527,021		441,385		357,431	

TOTAL EXPORTS

Country	1932/33	Per cent.	1933/34	Per cent.	1934/35	Per cent.	1935/36*	Per cent.
England ..	2,224,664	35	3,138,435	37	2,153,133	27	2,338,847	35
France ..	963,769	15	1,061,017	12	945,914	12	957,278	14
Germany ..	812,748	13	1,092,735	12	643,791	8	596,529	9
Japan ..	387,581	6	687,412	7	812,774	10	472,964	8
Spain ..	291,361	5	370,971	4	493,141	6	383,029	6
Italy ..	482,348	7	699,344	8	693,406	9	338,388	5
British Indies ..	134,768	2	246,323	3	594,679	7	274,112	4
Czecho-Slovakia	158,414	2	221,660	2	244,334	3	251,648	4
Switzerland ..	234,107	4	290,886	3	316,945	4	223,428	3
U.S.A. ..	282,311	4	475,043	5	254,913	3	221,753	3
Poland ..	94,558	1	178,912	2	179,051	2	136,752	2
China ..	72,208	1	109,319	1	104,396	1	93,942	1
Austria ..	39,881	—	65,987	—	77,418	1	81,852	1
Hungary ..	15,025	—	48,884	—	86,526	1	60,430	1
Belgium ..	27,538	—	38,747	—	91,167	1	51,997	1
Sweden ..	17,300	—	37,637	—	38,958	—	38,588	—
Canada ..	—	—	38,544	—	44,233	—	29,464	—
Other Countries	97,905	2	115,141	1	200,157	2	206,661	3
TOTAL ..	6,336,486		8,996,997		7,974,936		6,759,662	

* Up to 21st May, 1936.

CHAPTER I.

PROPAGANDA ON BEHALF OF RAW EGYPTIAN COTTON.

This should especially aim at persuading cotton spinners to prefer our cotton.

If the spinner is himself obliged to conform to the demands of buyers of yarn and the latter to the requirements of the consumer, his co-operation cannot be ignored, for to him falls the choice between Egyptian cotton and similar cottons which give him the same quality of yarn, and he can, to a certain degree, influence his clientele and guide its choice.

It is very much in our interest to approach the spinners of all countries. We should overcome their conservatism and routine habits by insistent advertising, with the object of bringing to their knowledge all the advantages they have in using our cotton, as there are many who are ignorant of it. We should carefully note the objections they bring against its use, in order to remove them or at least to reduce their number. Lastly, we should introduce them to all the facilities likely to attract them to our product.

The following practical methods could be used :—

- (1) Visits to spinners of different countries, made as frequently as possible by our foreign representatives and by the Egyptian section of the Joint Cotton Committee.
- (2) The appointment of commercial attaches specialized in cotton questions, who would do their utmost to foster close relations with the spinners of the countries to which they are nominated, and at whose disposal the Egyptian Government would annually put samples of our different varieties. The commercial attaches—or our representatives, where there are as yet no commercial attaches—would be commissioned to undertake large-scale advertising on behalf of our cotton, through the Press and by circulars, notes and statistics which they would send regularly to spinners. We are of opinion that the best factor of success in business matters is perseverance.
- (3) The establishment in Egypt of a Central Cotton Board, upon which the commercial attaches would depend, and which would direct their activities and furnish them with all necessary information. It would also reward with bonuses, prizes, promotions, etc., those whose efforts produced the most satisfactory results.

This Central Board, composed of competent persons, would enjoy a certain amount of administrative autonomy which would leave its movements free, as they would not be placed under the lengthy routine method of authorization to which the ordinary State services are subject. It would have at its head an Under-Secretary of State.

The Central Board would be in close contact with the business world and the Royal Stock Exchange and would study with them all the questions, as they present themselves, relating to an increased sale of our cottons.

- (4) The Egyptian Post Office could co-operate in a useful and inexpensive way in the advertising of our cottons by cancelling the postage-stamps of correspondence for abroad with a postmark recommending the use of the cottons.
- (5) The most effective publicity, however, is still cheapness.

This we must attain by reducing the cost of production to a minimum, by intensifying the yield of the land, and by abolishing all taxes which press upon cotton. We are glad to note that the cotton policy of the Egyptian Government has for some time been directed towards this end.

- (6) The displaying of samples of our cotton varieties in certain large towns, at exhibitions and fairs, is advisable.
- (7) It would be greatly desirable to reduce the number of our Egyptian varieties and to maintain and keep very pure the most popular.

The multiplicity of the varieties, and the instable quantities of each one of them, are extremely detrimental to the consumption of our cottons, the spinner being never sure of having a sufficient and uninterrupted supply of the variety of his choice.

CHAPTER II

PROPAGANDA ON BEHALF OF ARTICLES MADE WITH EGYPTIAN COTTON.

(A) *Propaganda in Egypt.*

This propaganda in the country should be made in an impressive fashion either by the Government or—and this we deem more effective—by a Committee set up for this purpose.

- (a) Our aim is to induce all Egyptians to use, whenever possible, only articles made wholly or principally with Egyptian cotton;
- (b) To persuade the Government to grant favoured Customs treatment for the said articles;
- (c) To stimulate in Egypt the movement so happily initiated by the Bank Misr for the creation of an Egyptian cotton industry.

Let us examine these three points:—

(a) *Induce all Egyptians to use only articles made with Egyptian cotton.*

This, for all the inhabitants of this country, is an obligation dictated as much by personal advantage as by patriotic duty. No opportunity of reminding them of it must be missed. We must also convince them that if certain of these articles are a little dearer, they are stronger and their greater resistance to wear makes up for the difference in price.

Lastly, the great and rich people of the country, men and women alike, must as a whole set the example by using nothing but these articles for their clothing, underwear, shirts, socks, neckties, handkerchiefs, table-linen, bed-sheets, motor-tyres, etc., etc.

(A) Cotton is certainly preferable to silk for shirts, dresses, etc. It is cheaper, more hygienic, washes better, lasts longer, and when Egyptian cotton is well combed and mercerized, articles as fine as beautiful pieces of silk can be made.

(B) It is to be preferred to wool for winter underwear since it is a better absorber of perspiration, shrinks less, can be cleaned more easily, lasts longer, and from the hygienic point of view analysis has shown that it is the best clothing to wear next to the skin.

(C) It is preferable to linen for sheets, handkerchiefs, table-cloths, table-napkins, etc., as when these articles are made with good Sakel cotton they become, after the first wash, as silky and fresh as the best linen articles, which cost three times as much.

(D) Lastly, experience has shown that cotton is the clothing par excellence of hot countries. Dyed with the appropriate colours, it resists better than any other fabric the rays of the sun which are the cause of sunstroke.

This brief and incomplete list of the advantages which cotton has over silk, wool, and linen, allows us to appreciate the enormous importance of advertising which, undertaken intelligently and persistently, would induce the inhabitants of this country to use nothing but articles with a basis of

Egyptian cotton. The programme for such propaganda could be drawn up in the following way :—

- (1) A manifesto addressed to Egyptians, in which appeal would be made to their patriotism as well as their personal advantages, by a Committee of Patronage, which His Majesty the King would be solicited to take under his High Auspices.
- (2) Sustained advertising in all newspapers and magazines appearing in Egypt.
- (3) Posters in all railway stations, schools, Government and Administrative Offices, and in all public places. These posters, designed artistically and in a manner to attract attention, could also be placed in the principal streets, cafés, theatres, etc. Illuminated advertisements.
- (4) Publicity in schools and mosques, by schoolmasters and Imams, on all cinema screens, on the envelopes of all correspondence put in the post, through wireless broadcasts, etc.
- (5) Arrangements with the large stores to stimulate this publicity with displays, bargain sales, gifts, competitions, mannequin parades, etc.
- (6) Organization of two Cotton Fêtes; one in the winter and the other in the summer of each year, when all those taking part would wear only articles of Egyptian cotton, and when prizes would be given for the best cotton dresses.
- (7) Permanent exhibition in the chief towns of Egypt of articles made with our cottons.
- (8) An annual exhibition called National Cotton Week.
- (9) Cinematograph films in Arabic, shown on the screen in Egyptian villages to draw attention to the advantage and necessity of using Egyptian cotton goods.
- (10) Encouragement by means of large bonuses to inventors of new industrial uses for our Egyptian varieties.

This list need not be limited. The Committee of Patronage is willing to study many other methods.

We suggest that this Committee of Patronage should embody representatives of the export trade, the large drapers' stores, and the producers.

(b) *Persuade the Egyptian Government to grant favoured Customs treatment for articles made with Egyptian cotton.*

This measure, the efficacy of which cannot be denied and which has been proposed for motor-wheel wrappings, can also be applied to a great number of articles. We do not think that insurmountable difficulties, of a legal or diplomatic order, will stand in the way.

It is only right that Egypt should favour by this means the consumption at home of articles made with her own cotton. All industrial countries can engage in manufacture of this kind and profit by Customs privileges.

Two points to consider in regard to the establishment of this preferential tariff :—

- (a) That certificates of origin should establish unquestionably that the article has been made with Egyptian cotton.
- (b) That the reduction of duty should apply only to articles which would be, because of their price, too exposed to the competition of like articles made with other material.

Another condition could be required whenever this arrangement were made—that the articles, for the duty to be reduced, should be clearly marked to the effect that it is made with Egyptian cotton (e.g., motor-tyres).

To which must be added that there will be no further object in having the preferential tariff in question when imported articles can be made in Egypt; on the contrary, at least for a while, it will be a protective tariff which will have to be borne in mind.

(c) Stimulate in Egypt the movement so happily undertaken by the Bank Misr for the creation of an Egyptian cotton industry.

To-day when the stimulus has been given, when objections of a climatic and technical order are removed, when the increase of population calls for new economic activity, the cotton industry should be developed in Egypt as it has been developed in other producing countries, notably in America and India.

But efforts must aim at our cotton industry being entirely supplied by cotton produced in Egypt.

(B) Propaganda Abroad.

The mainspring of this propaganda should be the Cotton Board mentioned in Chapter I, in collaboration with our diplomatic and commercial agency abroad and that of the Egyptian Advertising Committee (if it is decided to set it up)—it being evident that the methods employed cannot be absolutely the same for every country. Each would be suited by a special plan to be carefully studied. This is important, difficult work requiring a profound knowledge of the habits and customs of each region.

The general lines can be laid down in this report as follows :—

- (1) The advertising should not have an aggressive character, i.e., it will avoid warring openly against goods made with cotton from other sources, but will content itself with setting forth skilfully the advantages of Egyptian cotton.
- (2) It will be profitable to secure the co-operation of the spinners and weavers of the varieties of Egyptian cotton, that of the large drapers' stores, and of the leading commission agencies.

With this object in view, the Egyptian Cotton Committee will be in a position to lay the foundations of a campaign to be undertaken on behalf of articles in "Jumel," after an exchange of views with the representatives of the three groups mentioned above.

From this exchange of views, light will be thrown upon the problem as a whole and solutions found for all difficult points: differentiation between fabrics from the point of view of the source of their fibres, inspection, bonuses for meritorious work, financing, etc.

- (3) Publicity by means of the Press (newspapers and magazines), posters and illuminated advertisements, the cinema and the wireless, when carried out with method and discrimination cannot but be advantageous.

However, we must take into account, in using this means of choosing sites and publications, of selecting advertisement formulae and most successful drawings, the vast expenditure to be incurred; these are all questions which deserve serious study by persons specialized in this branch of work.

Thus the choice of periodical, to quote only this example, is a somewhat difficult problem; the industrial and commercial newspapers are more advisable than others for a certain type of advertisement, those read by ladies for another kind, etc., etc.,

Similarly, the formulae to be used are of capital importance: they must hold the attention of the reader, stimulate his taste, and arouse in him the desire to buy.

In order that the publicity campaign may be certain of the best chances of success, the efforts of all those interested must be co-ordinated. We must therefore get into touch with the organizations which have already been created for this purpose, notably in England and Germany.

In short, a concrete plan studied with care and adequately prepared in all its details is indispensable at the outset.

CONSUMPTION OF EGYPTIAN COTTON AND ARTIFICIAL SILK.

During the past 13 years the world's production of artificial silk or rayon has increased from 104,500,000 lbs. to 1,093,690,000 lbs. This latter figure includes the staple fibre. The increase has been continuous from year to year, except in 1930, which was due to special conditions resulting from the curtailment of production in the United States of America.

The prices shown in the table herewith are for the best quality viscose yarns in hank in the most popular denier. As they are British prices, the comparison is even less striking than it has been in other countries where there has been no excise duty, which has probably had a restricting effect upon British consumption since it was introduced in 1925.

Year	Price of 150-Denier British Viscose "A" Quality Hank ||	Average Price of Egyptian Yarn, 60's Twist in pence	World Rayon Production 1,000 lbs.||	World Consumption of Egyptian Cotton in bales.
1923	9/-	31.50	104,500	898,000
1924	7/6	31.50	140,800	1,028,000
1925*	7/6	39.36	189,200	970,000
1926	7/-	27.77	218,090	921,000
1927	6/-	27.94	288,385	993,000
1928	5/3	30.01	359,775	956,000
1929	4/9	25.77	440,740	989,000
1930	4/-	20.62	410,225	937,000
1931	3/3	15.58	470,790	853,000
1932	3/3	14.36	518,575	980,000
1933	3/1½	14.21	625,470	934,000
1934	2/7½	16.63	828,895	1,108,000
1935	2/4½	15.94	1,093,690†	1,084,000
1936	2/4½	—	—	508,000‡

* From July, 1925, to June, 1934, prices are inclusive of 1/- per lb. excise duty. Since then prices are inclusive of 6d. per lb. excise duty.

† Including 161,785,000 lbs. staple fibre, which is largely spun on fine cotton machinery, selling in England at 11d. per lb. in the raw state.

‡ For the half-year ending January 31st, 1936.

|| Furnished by the Textile & Engineering Press Bureau.

WORLD PRODUCTION OF RAYON AND SYNTHETIC YARN—1913 AND 1924-35.

Singles Yarn and Straw (in Million lbs.)

Date	Total World	United Kingdom	Japan	United States	Canada	Germany	Netherlands	Belgium	France	Italy	Switzerland	Austria	Poland	Czechoslovakia	Rest of World chiefly Russia
1913	24.2	6.6	—	1.5	—	7.7	—	2.9	3.3	0.3	0.3	—	—	—	1.6
1924	143.3	24.2	2.0	38.5	—	23.7	3.4	8.9	13.2	18.5	4.0	2.6	1.9	1.3	1.1
1925	188.0	26.4	2.8	51.9	1.3	26.0	8.8	11.0	14.3	30.9	6.2	2.6	2.3	2.1	1.4
1926	225.0	25.5	5.0	63.6	2.3	30.0	13.5	13.1	17.5	36.8	8.0	3.5	2.0	2.8	1.4
1927	306.7	38.8	11.0	75.5	2.6	40.1	16.5	13.5	21.0	53.8	10.3	3.5	4.0	3.5	2.6
1928	367.3	50.4	14.4	97.9	3.5	52.5	18.0	15.0	30.0	57.3	12.0	4.0	5.0	3.5	3.8
1929	432.6	52.4	18.0	131.3	3.7	55.1	20.0	15.0	37.0	71.3	12.2	3.6	5.4	4.2	3.4
1930	424.6	48.7	36.8	110.0	5.4	59.1	17.6	11.7	39.9	66.6	9.9	1.7	5.8	5.0	6.4
1931	493.8	54.7	49.2	144.4	5.3	61.9	18.7	9.9	44.1	76.3	9.9	Nil	8.0	6.2	5.2
1932*	520.1	72.5	69.7	134.9	7.1	62.2	19.8	9.3	50.7	70.5	8.8	.8	7.4	5.6	9.8
1933*	681.4	84.0	98.5	208.5	7.7	72.3	19.2	10.8	56.2	81.8	9.2	.9	8.1	6.0	10.8
1934*	815.0	93.0	152.6	210.3	10.2	91.7	21.9	9.4	70.5	106.5	10.2	1.9	9.7	5.7	11.9
1935†	932.0	110.0	224.0	257.0	12.8	103.0	19.5	11.5	53.0	85.8	9.0	1.8	11.3	6.1	27.2
1935‡	1,098.4	123.8	236.0	261.0	12.8	156.0	19.5	11.5	59.0	162.8	9.0	1.8	11.9	6.1	30.5

* It is possible that some of these totals for 1932 to 1934 include staple fibre, though official figures for rayon.

† Continuous filament and rayon synthetic yarn, excluding staple fibre.

‡ Continuous filament and staple fibre in total.

The above figures have been compiled from the best official information available, including Board of Trade, League of Nations, "Rayon Organon," the Textile and Engineering Press Bureau, Joint Committee Statistical Service, etc.

A White Cotton for Egypt.

Paper by H.E. FOUAD BEY ABAZA, Director-General Royal Agricultural Society. For the Meeting of the Joint Egyptian Committee, held at Sils-Maria (Switzerland), July 28, 1936.

Twelve years ago, in 1924, the technical staff of the Royal Agricultural Society of Egypt started a crossing between Maarad (which was also a creation of the same Society 14 years ago) and Sakel.

A great amount of breeding work (where Dr. T. Fahmi, Senior Mycologist to the Ministry of Agriculture, has given valuable help in the way of high wilt resistance) has been carried out on this newly-created cross before it was considered good enough for commercial propagation.

The outcome is a good yielder white cotton $1\frac{7}{16}$ in. staple length, which we named Bahtim Abiad (Bahtim is the name of the Societie's breeding farm near Cairo, Abiad is the Arabic word for white).

Bahtim is whiter than Sakel, Giza 7 and Casuli. It is as white as the old Egyptian Abassi, and we got spinners reporting on it to be whiter in yarn than Peruvian Tanguis.

The whiteness of Bahtim Abiad cotton makes it a type of its own, and therefore it is protected against undesirable mixing or blending with other cottons in Egypt. A similar natural protection due to a creamy brown colour has saved Maarad from mixing and deterioration.

The seed resembles that of Maarad cotton, it is a medium-sized seed, less than half-covered with green fuzz and with an average per cent. lint of 31 to 32 lbs. The lint characteristics are: strength, length and fineness resembling those of Giza 7. Strength tests on yarn have been kindly carried out for us by the Ministry of Agriculture of Egypt on the crop of 1935, the results of which are given thus:—

SPINNING TESTS (BAHTIM ABIAD)

Description	Wt. of Sample grms.	Staple Length inches	Card Wastes t.i. %	Flats %	Strength Count 60'S 0 Dle. rove
Plot 655	2,175	$1\frac{7}{16}$	2.51	2.65	2,600
" 656	2,065	$1\frac{1}{2}$	2.41	2.69	2,350
" 657	1,865	$1\frac{7}{16}$	2.53	2.74	2,430
" 658	2,080	$1\frac{7}{16}$	2.52	2.48	2,520
" 659	2,090	$1\frac{1}{2}$	2.15	2.63	2,475
" 660	2,055	$1\frac{7}{16}$	2.00	2.60	2,530
" 661	2,270	$1\frac{7}{16}$	2.23	2.60	2,480

FINAL SPINNING TEST REPORT (BAHTIM WHITE)

Description	Staple Length inches	Peak Height*	Card t.i. %	Waste flats %	Count 60C3.6	Product 60V3.6	lea Str., 2/60V 4.0
Plot 655	$1\frac{7}{16}$	21.8	2.51	2.65	2,600	2,670	3,515
" 656	$1\frac{1}{2}$	23.4	2.41	2.69	2,350	—	—
" 657	$1\frac{7}{16}$	22.2	2.53	2.74	2,430	2,560	3,550
" 658	$1\frac{7}{16}$	21.6	2.52	2.48	2,520	2,465	3,540
" 659	$1\frac{1}{2}$	22.6	2.15	2.63	2,475	2,525	3,550
" 660	$1\frac{7}{16}$	22.8	2.00	2.60	2,530	2,615	3,500
	$1\frac{7}{16}$	24.6	2.37	2.65	2,450	—	—

Reports from cotton exporters at Alexandria and some spinners in Europe are very encouraging.

Its price will be similar to that of Giza 7 or slightly lower.

Bahtim Abiad cotton could be used in the spinning of yarn for hosiery, which would be knitted into fabric without requiring bleaching or dyeing, thus saving the expenses of these processes.

* Measure of Staple Regularity.

FIRST GOVERNMENT COTTON CROP ESTIMATE, 1936-37.

The first official estimate of the current Egyptian crop was issued recently. This indicated an increase of some 10 per cent. in the total outturn as compared with last year's. The detailed returns show decreases of 38 per cent. and of $12\frac{1}{2}$ per cent. respectively in the prospective yields of Sakellaridis and of medium-stapled varieties, but increases as compared with last season of 42 per cent. in long-stapled varieties other than Sakellaridis and of $8\frac{1}{2}$ per cent. in Ashmouni and Zagora. The position is illustrated in the following table (in cantars):—

		1936-37		1935-36		1934-35	
		First	Final	First	Final	First	Final
		Estimate	Estimate	Estimate	Estimate	Estimate	Estimate
Cotton over $1\frac{1}{2}$ Staple	{ Sakel	561,000	962,000	901,100	1,242,723	1,002,452	
	{ Others	2,499,000	1,668,000	1,754,500	1,417,139	1,215,258	
Cotton over $1\frac{1}{2}$ Staple	..	182,000	228,000	208,200	282,842	212,050	
Cotton over $1\frac{1}{2}$ Staple	..	5,942,000	5,228,000	5,478,500	5,103,709	4,960,760	
Total		9,184,000	8,086,000	8,342,300	8,046,413	7,390,520	
Scarto		214,000	169,000	192,500	170,288	164,769	
Total, including Scarto		9,398,000	8,255,000	8,534,800	8,216,701	7,555,289	

GINNING REPORT.

On October 12 the Ministry of Agriculture published the following ginning report covering the month of September, 1936 (comparative figures are also given):—

		1936	1935	1934
		Cantars	Cantars	Cantars
Sakellaridis .. ..	..	26,780	18,509	38,945
Other long staple varieties, $1\frac{1}{2}$ in. ..	..	254,775	100,491	109,618
Medium staple varieties, $1\frac{1}{2}$ in. ..	..	11,782	12,061	13,918
Medium staple varieties, $1\frac{1}{2}$ in. ..	..	1,525,355	865,495	955,302
Scarto .. ..	..	26,841	12,553	15,071
Total		1,845,533	1,009,109	1,132,854

EGYPTIAN COTTON CROP, 1936.

The following details of the area cultivated to the different varieties of Egyptian cotton during 1936 were published recently by the Egyptian Ministry of Agriculture:—

Variety	1936 Feddans	1935 Feddans
Maarad	71,656	81,705
Sakha 4	41,773	27,591
Sakellaridis	162,072	297,409
Giza 7	407,022	269,795
Giza 12	5,835	—
Fouadi	18,815	31,507
Giza 3	8,941	10,351
Ashmouni and Zagora	998,393	938,285
Other varieties	1,298	12,362
Total	<u>1,715,805</u>	<u>1,669,005</u>

The area of each cotton variety cultivated in 1936, in comparison with the corresponding figures of the four preceding years, is as follows (in thousands of acres):—

Varieties	1936	(Thousands acres)			
	1936	1935	1934	1933	1932
Maarad	74	85	57	114	72
Sakha 4	43	28	10	84	—
Sakellaridis	168	309	436	406	383
Giza 7	423	280	297	129	36
Giza 12	6	—	—	—	—
Fouadi	20	33	41	51	18
Giza 3	9	11	10	7	7
Ashmouni and Zagora	1,036	974	919	1,049	526
Other varieties	1	13	28	69	93
Total	<u>1,781</u>	<u>1,733</u>	<u>1,798</u>	<u>1,873</u>	<u>1,135</u>

EGYPTIAN COTTON SEASON, 1935-36.

The Commission de la Bourse de Minet-el-Bassal, in their annual statement for the season September 1, 1935, to August 1, 1936, issue the following:—

				Cantars net
Arrival at Alexandria (sacks and bales) .. .. .	..	..	..	8,305,813
To be added at end of year to balance .. .. .	..	..	..	<u>50,826</u>
				8,356,639
		Bales		
Arrival at Port Said .. .. .	..	2,709	..	<u>18,509</u>
				8,375,148
Exports from Alexandria .. .. .	..	1,098,972	..	<u>8,080,704</u>
Exports from Port Said .. .. .	..	2,709	..	<u>18,509</u>
Total .. .. .	..	<u>1,101,681</u>	..	<u>8,099,213</u>

								Cantars net
Carry-over in Alexandria	..	..	..	..	..	..	..	442,708
Arrivals as above	..	..	..	..	..	..	..	8,375,148
								<u>8,817,856</u>
								Cantars net
Exports as above	..	..	..	..	..	..	..	8,099,213
Samples exports according to Customs House	..							1,288
								<u>8,100,501</u>
Local consumption	..	..	..	..	..	..	..	127,847
Returned to the interior	..	..	..	..	..	..	..	100,620
								<u>228,467</u>
								<u>8,328,968</u>
Stock <i>net</i> at Alexandria on August 31, 1936	..							<u>488,888</u>

DETAILS OF STOCK ON AUGUST 31, 1936

								Cantars
Achmouni	..	..	..	..	..	..	..	117,292
Zagora	..	..	..	..	..	..	..	52,427
Sakellaridis	..	..	..	..	..	..	..	110,276
Pilion	..	..	..	..	..	..	..	430
Maarad	..	..	..	..	..	..	..	47,429
Nahda	..	..	..	..	..	..	..	2,362
Fouadi	..	..	..	..	..	..	..	13,184
Giza No. 3	..	..	..	..	..	..	..	2,062
Giza No. 7	..	..	..	..	..	..	..	36,099
Sakha No. 4	..	..	..	..	..	..	..	29,534
Scarto—Sekina	..	..	..	..	..	..	..	23,444
Afrita	..	..	..	..	..	..	..	6,906
Other varieties	..	..	..	..	..	..	..	47,443
								<u>488,888</u>

The New Egyptian Cotton Contract in Liverpool.

WE publish below an article prepared by Mr. John A. Todd for a recent issue of the *Textile Recorder*:—

The unanimous adoption last month of a new futures contract to replace the existing Sakel contract on the Liverpool market will it is hoped be the end of a controversy which has been going on for a very long time. There have for many years been separate contracts for Sakel and Uppers both in Alexandria (since 1920) and in Liverpool (since 1924) the idea of course being that the respective contracts in the two markets should represent the same commodity. But for a long time now this has been particularly untrue with regard to the sakel contract. The trouble began in 1924 when Liverpool admitted Sudan Sakel, which forms

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a very large part of the Sudan crop, for tender against their new Sakel contract, but as the Sudan crop no longer passed through Egypt, the Alexandria authorities had excluded it from their Sakel contract. In 1932 the Alexandria Bourse, recognizing the fact that Sakel was no longer the only long-staple cotton produced in Egypt, widened their Sakel contract to include Maarad, and later also Giza 7, these being the two most important of the new varieties, but after a great deal of cogitation the Liverpool market postponed the question of a similar alteration in their contract.

Another difficulty arose owing to the appearance of a new Sakel in the Sudan known as 1530. This apparently bears about the same relation to Gezira Sakel as Giza 7 does to Egyptian sakel, and presumably it is tenderable on the Liverpool Sakel contract as Sudan Sakel.

In effect the only thing that is common to the two Sakel contracts now is Egyptian Sakel, and the supply of that has dwindled so rapidly in recent years that last season the crop was less than a million cantars, and in view of the acreage figures now available for the coming season this year's crop will be considerably less. But the other long staples grown in Egypt last year amounted to fully 1,750,000 cantars, of which Maarad and Giza 7 alone accounted for 1,628,925, and as the acreage under Giza 7 this year has again been substantially increased that figure will certainly be much higher, say 2,300,000 cantars.

The result is that there were in all only about 1,900,000 cantars grown of varieties tenderable against the Liverpool contract and about 2,500,000 tenderable against the Alexandria contract, but only about 900,000 cantars last year were common to both. To add to the difficulty a great deal of Egyptian Sakel in recent years has been rejected on tenders against the Liverpool Sakel contract, so that the actual amount available to protect the contract was much less even than the figures shown. The result was very unsatisfactory because it meant that at times the Liverpool contract was left almost unprotected by actual cotton and prices were liable to manipulation in the most undesirable way, while at other times the market was left largely at the mercy of the holders of Sudan Sakel. The effect of this was seen in the very erratic movements of futures prices for Sakel cotton in Liverpool, not only as compared with American but also as compared with Uppers. During last season and what has already gone of this season for example, the percentage premium of Sakel over American has fluctuated from about 25 per cent. to 70 per cent., while the range of Uppers premiums during the same period has been from 10 per cent to 20 per cent.

The new contract will at least go some way towards bringing the Liverpool and Alexandria contracts into line, though it will not get over the fundamental difficulty that Liverpool includes Sudan Sakel and Alexandria does not. Trading in the new contract will begin on October 1 for delivery in January, 1937, and onwards, while the existing Sakel contract will expire on September 30, 1937. The old contract was based on F.G.F. Sakel grown in Egypt or the Sudan, but the new one is based on F.G.F. Giza 7. It is stated to be for Giza 7 grown in Egypt and Sakel

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grown in Egypt, also Sakel or similar varieties grown in the Sudan, based on Liverpool grade and staple standards. The varieties may be tendered under the description of their respective growths or as Egyptian or Sudan cotton, whichever is applicable. No cotton tendered is to be below the grade of Good Fair Giza 7 and the staple is to be not less than the Liverpool standard for Fair Staple Giza 7. In no instance is a seller to be awarded an allowance of more than 4d. per pound on any cotton tendered.

With a possible crop not far short of two million cantars of Giza 7 this season, against Sakel something under half a million, the contract has of course substantially changed its character, being now a Giza 7 contract instead of a Sakel contract. But the contract should be much better protected than in recent years, particularly last season, and with the steady increase of Giza 7 it will not be liable to the same extent to domination by the Sudan Sakel crop. It should at least meet the major difficulty that buyers of Giza 7 had no contract providing an adequate hedge against their purchases, which in recent years were very largely of that variety and not of Sakel.

EGYPTIAN GINNERS FORM NEW ASSOCIATION.

One of the resolutions adopted by the Joint Egyptian Cotton Committee at its last meeting in Alexandria and Cairo expressed the hope that an endeavour would be made by the Egyptian authorities to organize an Association of cotton ginner in Egypt.

Department of Agriculture officials and the Alexandria cotton merchants have since been working to this end, and we have pleasure in stating that such an organization has now come into being.

The title of the Association is the *Chambre de l'Industrie Egyptienne de l'Egrenage du Coton*, and will work under the auspices of the Egyptian Federation of Industries. The President of the new organization is Abdallah Bey Fikri Abaza, of the Misr Ginning Company.

In a press statement it is stated that the main objects of this Association will be the defence of the interests of the Egyptian cotton ginning industry, in harmony with the general economy of the country, and the study of all questions, direct or indirect, interesting that industry which are submitted to it by members, either by institutions or by Government departments.

CROP REPORT.

The Commission de la Bourse de Minet-el-Bassal state in their résumé of information received during September the following:—

Lower Egypt: In spite of some cool damp nights the tempera-

ture during September was on the whole favourable to the plants.

First picking is general, about fifteen days early. In the South it is nearly finished.

In view of the earliness of the crop there has only been one picking in most provinces. Prospects for second pickings are poor in consequence. A large proportion of the bolls are damaged by boll-worm and the cotton obtained will be of inferior quality.

The yield per feddan, though irregular, will be in general slightly higher than last year.

The ginning outturn, though irregular, is about the same as last year.

Upper Egypt and Fayoum: The temperature during September was generally favourable to the crop. First picking, fifteen to twenty days early, is nearly finished.

The yield per feddan, except in certain districts, is on average higher than last year.

Second picking will be of little importance.

The ginning outturn, though variable is about the same as last year.

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MARKET REPORTS.

Messrs. Reinhart & Co., of Alexandria, have communicated the following report under date of October 16:—

SPOT MARKET.

The good demand for Ashmouni/Zagora and Giza 7 continued throughout this week. Total sales are returned with 13,687 bales, of which 5,004 bales Ashmouni, 2,839 bales Zagora, 3,836 bales Giza 7, 1,261 bales Sakellaridis. 223 bales Fouadi, 219 bales Maarad, and 305 bales of other varieties. Premiums of Ashmouni/Zagora and Sakellaridis have somewhat advanced of late, and holders are pretentious owing to the high prices ruling up-country. Premiums of Maarad remained stationary whilst those of Giza 7 have not taken the full advance of futures prices. Medium grades especially have been depressed of late.

Messrs. Cicurel & Barda, Alexandria, have sent us the following report, dated October 12:—

The publication of the Government figures had a temporarily depressing effect on the market, but values subsequently rallied and the market is now displaying a rather steady undertone, despite the fact that cotton is coming down to Alexandria in larger quantities, while export demand is certainly not as active as it used to be at this time of the season in previous years.

There is a feeling, however, that most of our buyers abroad are running short of cotton, and that there is a big backlog of orders to be filled in the not too distant future. A good deal of the hedging against the crop having already been absorbed, this prospect is likely to make for a potential rise.

On the other hand, same as in Europe and America, a constructive view is being taken of the recent international monetary arrangement which is expected to bring about a revival in trade, likely to offset whatever business Egypt may have lost in Spain and other countries where currency restrictions make normal trading rather difficult.

As regards the relation between the different options, as well as straddle parities, the figures we give above make the position pretty clear. The premium of the near month Sakel has advanced to 67 points at the close yesterday against 44 points a month ago, and there is certainly no sign of the tendency being reversed in the near future. Tendering Sakel is out of the question just now, and holders have the market very much their own way.

Near months Uppers, on the other hand, are at a discount under the next options, which at a moment was temporarily increased on transfer of purchases due to the fear of receiving Fayoum dockets. Tenders, however, have totalled only 3,000 cantars on first delivery day and 3,750 cantars yesterday, and we do not expect any appreciable change in the position for the moment.

There has been a new contract for Giza quoted at Liverpool at a difference about the same as in Alexandria, which induced sporadic straddle buying of Sakels against sales of Giza Liverpool.

The tightness of the Sakel position caused the Sakel/Uppers parity to widen up to 501 points which, on the face of it seems rather excessive, but the movement is mostly speculative, and there is no saying how far it can be carried further.

COTTON SHIP-

Total Shipments 1904-1905	SHIPPERS.	England	France	Germany	Japan	Spain	Italy	India	Switzerland	Czechoslovakia
102,302	97,856 Peel & Co. Ltd.	23,226	11,579	11,903	4,961	19,068	4,197	972	3,772	3,166
55,396	60,002 Alexandria Commercial Co. S.A.	26,430	2,535	3,438	9,308	4,249	2,415	476	1,210	5,522
46,529	63,412 Carver Bros. & Co. Ltd. . . .	18,871	10,655	1,812	1,512	4,848	4,087	5,071	1,332	1,327
52,945	61,281 Anderson, Clayton & Co. . .	12,838	9,957	8,007	50	3,041	9,258	2,841	930	1,124
46,001	57,705 Ah. Farhaly Bey	27,156	5,102	11,074	1,800	450	3,155	1,478	1,310	186
40,466	54,704 Eg. Prod. Trading Co. S.A. .	30,905	5,580	2,378	7,028	1,260	1,469	1	—	828
83,221	51,290 Cicurel & Barda	18,504	11,322	1,973	8,970	2,720	2,372	1,389	90	893
42,052	43,204 Reinhart & Co.	2,380	10,633	4,596	9,844	210	1,127	2,835	3,157	1,060
34,066	42,931 Levy, Rossano & Co.	18,583	11,423	992	—	—	572	5,324	50	230
21,493	35,060 Salvago C. M. & Co.	13,916	10,313	609	200	910	950	582	630	2,300
42,064	34,513 Choremi, Benachi & Co. . . .	6,981	3,390	3,060	950	607	408	1,158	5,142	7,901
36,680	33,230 Planta J. & Co.	8,409	1,055	461	910	6,938	4,108	515	2,140	4,719
43,801	31,750 Soc. Misr.	1,942	1,159	11,569	3,950	50	—	328	60	3,087
44,503	31,385 Pinto & Co.	3,467	1,938	2,057	—	625	5,824	1,683	1,125	2,786
26,985	30,301 Kupper, H.	543	3,095	5,693	8,035	1,180	1,025	50	5,823	111
25,580	24,810 Rolo, J., & Co.	13,794	4,585	—	—	1,702	411	1,042	331	198
32,285	23,589 British Eg. Cotton Co. . . .	12,417	3,840	459	200	2,680	230	2,158	—	450
18,832	22,384 Rodocanachi & Co.	15,319	2,363	457	3,300	225	—	—	—	288
80,708	22,345 Fenderl & Co.	4,689	2,169	2,250	250	1,571	2,558	75	947	1,529
20,417	22,050 Soc. Cottonière d'Egypte . .	12,758	2,073	2,102	—	100	164	1,449	180	780
21,859	21,659 Japan Cotton Trad. Co. . . .	—	—	—	21,209	—	—	—	—	—
16,235	16,425 Union Cotton Co.	8,831	4,169	25	—	833	1,516	5	—	—
14,787	15,306 Getty, W., & Co.	847	1,338	4,094	—	2,661	670	515	2,470	1,555
11,895	14,300 Anglo-Continental Cotton Co. 13,340 Alexandria Cot. Trad. Co. . .	6,729	2,455	—	—	506	—	2,583	—	—
9,903	13,032 Elia Bondi	12,272	—	—	150	—	—	—	—	100
13,906	11,860 Eg. Cot. Ginners & Exporters 7,357 Greguscl, C., & Co.	1,933	388	2,026	—	1,110	—	5,797	420	—
13,099	11,169 Escher, W.	3,822	5,184	84	—	1,240	90	126	210	—
12,519	10,337 Eastern Export Co.	292	906	6,189	300	240	908	—	1,232	692
8,578	10,337 Eastern Export Co.	7,702	298	1,107	—	—	350	—	800	—
16,558	9,608 Aglion, Riquex & Co.	3,778	4,049	373	1,000	—	100	—	—	113
9,644	9,347 Sakellarios & Co.	5,802	2,351	197	—	45	—	172	120	288
5,967	8,748 Francis, Levy & Co.	5,787	847	36	75	20	87	1,795	—	36
10,117	8,593 Bibace & Co.	8,513	5	—	—	—	—	75	—	—
5,530	8,588 Daniel Pasquinelli & Co. . . .	2,003	1,929	935	—	140	—	1,338	—	742
6,394	8,222 Comptoir Cottonier d'Egypte 6,801 Zalsal, Felix M., & Co. . . .	4,113	3,849	—	—	—	—	—	—	—
8,666	6,536 Casulli, M. S., & Co.	5,936	98	642	—	75	—	—	—	—
10,277	6,482 Cotton Co. (W. F. Russi & Co.) 8,351 Yazgi, A. & W.	1,891	456	781	—	242	50	76	2,265	158
7,413	6,250 Riches, Stabile et Co.	3,578	122	—	—	—	—	25	1,552	—
8,949	6,171 Engel Adrien & Co.	2,020	3,870	—	—	155	—	—	—	—
5,705	6,250 Riches, Stabile et Co.	4,166	748	—	—	—	1,120	—	—	—
1,954	6,171 Engel Adrien & Co.	1,077	2,118	1,112	—	60	450	300	—	—
4,683	5,895 Joakimglou, C. Z., & Co. . . .	1,706	1,900	1,050	—	—	281	175	—	162
—	4,525 Elia, D. & A., & Co.	4,525	—	—	—	—	—	—	—	—
—	2,361 Cambas, P., & Co.	999	673	244	—	—	275	—	—	—
—	997 Camilleri Hector & Co.	192	625	120	—	—	60	—	—	—
—	754 Lumbroso, M., et Co.	797	—	—	—	—	—	—	—	—
—	819 Kafr el Zayat Cotton Co.	—	319	—	—	—	—	—	—	—
27,599	3,298 Various	2,224	493	18	—	—	5	—	30	36
104,981	1,101,681 Total	879,643	154,421	96,302	79,000	59,883	52,362	43,994	37,518	42,457

Total of 1,101,681 Bales Cotton weighing 8,099,213 Cantars.

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East Indian Cotton.



First Official Cotton Forecast, 1936-37.

This forecast is based upon reports on the condition of the cotton crop at the end of July or early August. The reports do not, as will be seen from the detailed notes below, relate to the entire cotton area of India but to only 79 per cent. of the total.

The area sown is at present estimated at 15,769,000 acres, as compared with 15,271,000 acres (revised) at the corresponding time of last year, or an increase of 3 per cent.

Weather conditions at sowing time were not quite favourable, as sowings are reported to have been delayed in places by absence or deficiency of rain. The present condition of the crop, on the whole, is reported to be fairly good.

Detailed figures for the provinces and States are as follows:—

Provinces and States	Acres (thousands)		
	1936-37	1935-36	1934-35
Bombay-Deccan (including Indian States) ..	1,302	1,496	1,141
Central Provinces and Berar	4,099	4,282	4,303
Punjab (including Indian States)	3,305	2,807	2,442
Madras	286	*302	198
United Provinces (including Rampur State)	575	558	805
Sind (including Khairpur State)	855	779	†
Burma	518	461	386
Bengal (including Tripura State)	74	73	73
Bihar	31	31	38
Assam	37	35	34
Ajmer-Merwara	15	14	15
North-West Frontier Province	17	17	20
Orissa	5	5	5
Delhi	2	3	2
Hyderabad	1,485	1,420	745
Central India	1,270	1,145	1,122
Baroda	833	808	647
Gwalior	608	614	632
Rajputana	436	406	372
Mysore	16	15	11
Total	15,769	15,271*	12,991†

*Revised.

† Not available.

‡ Excluding Sind.

A statement showing the present estimates of area classified according to the recognized trade descriptions of cotton is given below :—

Descriptions of Cotton	Acres (thousands)	
	1936-37	1935-36
Oomras—		
Khandesh	1,225	1,266
Central India	1,878	1,759
Barsi and Nagar	811	904
Hyderabad-Gaorani	719	725
Berar	2,798	2,894
Central Provinces	1,301	1,388
Total	8,732	8,936
Dholleras	255	236
Bengal-Sind—		
United Provinces	575	558
Rajputana	451	420
Sind-Punjab	2,249	†2,659*
Others	41	41
Total	3,316	†3,678*
American—		
Punjab	1,466	947
Sind	464	†
Total	1,930	†947
Broach	578	572
Coompta-Dharwars	27	18
Westerns and Northern	112	103
Cocanadas	24	19
Tinnevellies	162	187
Salems		
Cambodias		
Comillas, Burmas and other sorts	633	575*
Grand total	15,769	15,271*

* Revised.

† Details of areas under American and Desi varieties in respect of Sind and the Indian States of Punjab not being available, the entire cotton area of these tracts has been included under Sind-Punjab (Bengal-Sind).

‡ Included under Sind-Punjab (Bengal-Sind).

TECHNOLOGICAL REPORTS ON STANDARD INDIAN COTTONS, 1936.

Prepared by Dr. NAZIR AHMAD, M.Sc., Ph.D., Director of the Indian Central Cotton Committee, Technological Laboratory, Matunga, Bombay. (Series A, No. 33.)

The term "Standard Indian Cottons" is applied to certain improved varieties of cotton which are steadily replacing the older varieties in different parts of India and which, at present, cover some 15 per cent. of the total area under cotton cultivation. It is the practice at the Technological Laboratory to subject the standard

cottons of each season to a very thorough test for their fibre-properties and yarn characteristics. The Technological Reports included in the present bulletin contain the detailed results of these tests on standard cottons of thirteen seasons, viz., 1923-36, together with the Agricultural Details, the Grader's valuation reports and the Spinning Master's report on each cotton. Complete information regarding the treatment, waste percentages, yarn-breakages and the physical conditions prevailing in the Laboratory is also given in these reports. The general plan followed in each report is the same as in the past years with the following difference. The fibre tests for the determination of fibre-rigidity, ribbon-width and number of convolutions per inch have been discontinued, for reasons explained in the Introduction, from the 1932-33 season. Consequently, values of these fibre-properties are given only up to the 1931-32 season. On the other hand, the determination of the percentages of mature and immature fibres in each of the standard cottons was begun in 1934-35, and the results obtained since are included in this Bulletin. Furthermore, the methods and technique of fibre, yarn and spinning tests employed at the Technological Laboratory, instead of being described each year in the Introduction, have been dealt with, once for all, in a separate Technological Bulletin, Series A, No. 25.

The Indian Central Cotton Committee Technological Laboratory have forwarded to us spinning test reports on samples of the following cottons:—

	Bulletin No.
Dholleras	241
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Miray	249
Teruppur Cambodia	250
Karumganni	251
Northern Cambodia	252

Copies of these pamphlets will be forwarded to any applicant by the Indian Central Cotton Committee Technological Laboratory, Matunga, Bombay.

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CROP REPORT

Messrs. Volkart Brothers, of Winterthur, published on October 9 their first Indian cotton crop report for the season, which we give below :—

	1936/37 5/10/36	1935/36 final	1934/35 final
Sind and Punjab/Desi	1,050,000	935,000	943,000
Punjab/American and Sind/American	1,415,000	1,355,000	809,000
United Provinces and Rajputana ..	305,000	320,000	309,000
Omras	2,200,000	1,763,000	1,529,300
Broach and Surtis	500,000	581,000	263,900
Dhollera and Muttia	525,000	589,000	350,600
Comptak/Dharwar	158,000	162,000	132,000
Coconada and Warrangal	40,000	38,000	34,200
Bombay and Madras, Western and Northern	23,000	328,000	197,700
Tinnevelly and Cambodia	380,000	339,000	356,500
Calcutta and Burma	155,000	157,000	128,700
Total Crop	7,021,000	6,566,000	5,053,900
Domestic consumption	750,000	750,000	750,000
Carry-over	1,105,000	1,051,000	1,411,000
Total Supply	8,876,000	8,367,000	7,214,900
Export to Europe, etc.	1,850,000	1,617,000	1,370,000
Export to Japan	2,000,000	2,130,000	1,629,000
Export to China	25,000	119,000	120,000
Indian Mill Takings	2,600,000	2,546,000	2,214,000
Home Consumption	750,000	750,000	750,000
Burma Offtake	100,000	100,000	80,000
Total Offtake	7,325,000	7,262,000	6,163,000
Carry-over per 31.8.37	1,551,000	1,105,000	1,051,900

As pointed out in our report of September 11, we had no faith in the rumours about a smaller Indian crop, but now estimate the yield about half a million bales higher, with the exception of some unwanted rains in this and the other of the Omra districts, the crop has grown under most favourable conditions, and provided there are no untimely rains henceforth, this year's yield promises to be a new record, and the quality will also be satisfactory. This favourable outlook is already discounted in the attractive prices at which Indian cotton is now offered. At these rates there will be nothing to stop the crop from being wholly used up. Any deterioration of the crop would, however, be followed by a prompt contraction of the parity. It is noteworthy that actual Indian cotton costs exactly as much as a year ago, whereas Liverpool futures of American cotton stand about 10 per cent. higher.

But we repeat that as far as the Continent is concerned, we expect these improved economic conditions to be realized at long sight only, and we are not yielding to any illusions meanwhile."



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Graduated High Draft.

Much research work has been carried out during the past few years with a view to obtaining economies in the cost of production of cotton yarns. The majority of the work has been on spinning frames in an effort to provide systems for utilizing higher drafts, and spinning from coarser rovings, since the production of coarser rovings means less preparatory machinery for a given weight of material, and considerable saving in many respects. The result of the research work, as is well-known, is the many systems of high drafting now widely used on ring spinning frames.

The amount of draft that can be utilized at the spinning machines is dependent upon the class of cotton and length of staple used. If the draft utilized is excessive, the resultant yarn will suffer in quality.

Recently much attention has been devoted to the preparatory machines themselves with a view to equalizing drafts on all machines by increasing the drafts at the flyer frames, and maintaining normal high drafts, and even, in some cases, reducing the draft at the spinning frame. In this way, a good quality yarn can be produced without excessive drafting at any operation, the graduation of drafts through three machines tending to give a better result than an intensive high draft in the final machine.

According to the manufacturers, Messrs. Platt Bros., the total draft from drawing-frame sliver to roving can be varied to a great degree, and excessive drafts need not be used.

It is claimed that this system has the further advantage, very important in most cases, that it allows the existing plant to be remodelled without the installation of a new type of plant to which the operatives are unaccustomed. Conversion is achieved by the addition of an extra line of top and bottom rollers, with the necessary gearing and cap bars, etc., together with condensers to each of two passages of flyer frames.

The makers recommendation for a complete unit of preparing and spinning machinery, therefore, is for two or three passages of drawing, two passages of flyer frames, with four lines of rollers for higher than usual drafting, and ring spinning frames for high

drafting. It would be difficult to give definite particulars to meet the requirements of every spinner.

With the four-line roller system, the drafting is more gradual as between the successive lines of rollers. A flyer frame with three lines of rollers and a total draft of 5.29 would have a break draft of about 1.15 between third and second lines of rollers and a final draft of 4.6 between second and front lines of rollers, giving a total draft of 5.29, viz., $1.15 \times 4.6 = 5.29$. A frame with four lines of rollers with this break draft and this final draft, and an intermediate draft of 1.6 between third and second lines of rollers would have a total draft of 8.46, namely, $1.15 \times 1.6 \times 4.6 = 8.46$. Thus, while the total draft is higher with the four-line system, it is achieved by a more gradual sequence of drafts, and with break draft and final draft no greater than is the case with three lines of rollers. In fact, in many cases with the four-line system the break draft and the final draft are actually less for a greater total draft than with the three-line system.

This more gradual drafting undoubtedly provides rovings of greater regularity, and by the judicious use of higher than usual drafts rovings for the production of a wide range of counts can be prepared *by a less number of machines than with any other method*.

The number of drawing and fly frames based on 20,000 ring spindles spinning various counts in examples are: 16's, 37; 20's, 30; 30's, 15; 40's, 21; 50's, 20; 60's, 15; 80's, 11. This is in every case less than the systems with high draft only at the ring frame by anything from 16 down to three frames (for 80's) less and as many as 39 frames less than the ordinary system. The number of operatives is reduced in about the same proportions and the output per operative increased by the same percentages, as well as there being similar savings in output on machinery (in new plants), floor space, upkeep, and power.

BOBBIN STRIPPING MACHINE

A few years ago, Dronsfield Bros., Ltd., Oldham, placed on the market a very economical and useful machine for the purpose of stripping the waste yarn from pirns, ring bobbins and parallel tubes of all descriptions. This machine was power driven and the makers were prevailed upon to design it, after the success of their stripping appliance operated by hand, which they had introduced previously. The object of both machines is to save the cutting of the pirns and bobbins by knives, the use of which is accountable for considerable expense in spoiled bobbins in every mill.

The power machine in question was continuous in its action and worked perfectly well, but "familiarity breeds contempt," and the manipulation of the machine being so easy and operatives becoming correspondingly careless in timing the insertion of the bobbin, the possibility of accident was certainly existent, by reason of the thrusting and withdrawing action being continuous.

Recognizing this possible danger to the operatives, most of



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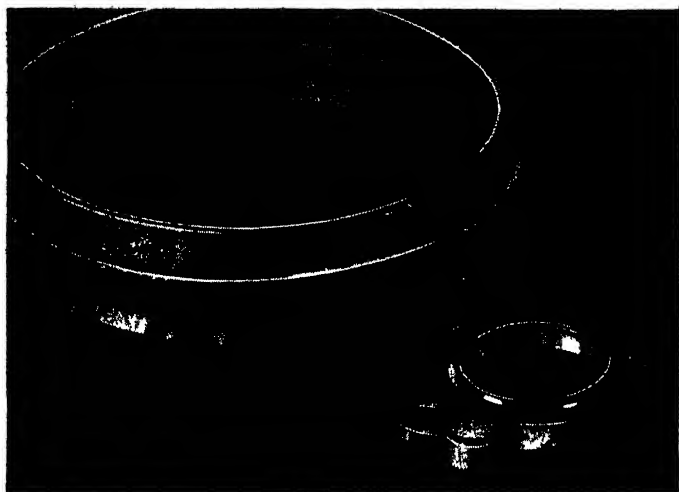
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whom are young girls, the inventors decided to redesign the machine in order to make it perfectly safe to use and proof against any possible accident. While not departing from the fundamental principles of the machine in their new design, Dronsfield Bros. have now produced an apparatus with which it is impossible to have an accident either to the operator or the bobbin.

The new machine has been designed to overcome the defect of continuous thrusting and withdrawing, the traverse of the plunger being arrested after each thrust. The machine is thus rendered stationary while a fresh pirn is placed in position for stripping. Every type of pirn, bobbin or roving tube can be stripped of material on this machine with the exception of bobbins flanged at both ends.

Automatic Shuttle Changing Attachment

Messrs. Butterworth & Dickinson Ltd., of Burnley, have now adopted a shuttle-changing attachment which has been developed continuously for the past few years on the Continent.

It uses the Walter patents for a shuttle-changing attachment which is applied to new or existing single-shuttle looms of almost any type, overpick or underpick, fast or loose reed.

As it is a shuttle-changing mechanism the question of an "automatic system" using special supplies of weft does not arise. The same shuttles and the same types of weft are used after the motion is fitted. Also on the loom itself the motion is entirely separate from other motions of the loom. It is a stand-by mechanism. Whatever the loom would do without it, in speeds and weaving, it will do with the motion, no part of which comes into movement at all except to change the shuttle. Another important point is that the attachment does not demand any higher standard of accuracy or precision in the loom or, indeed, accuracy of adjustment. It has been successfully worked and tested on looms fitted only for the scrap heap. The design of the parts whereby damage is avoided in the various contingencies of weaving is a notable feature.

The loom is fitted with a cone-type clutch, which is controlled by a starting-handle of ordinary type except that it has three positions instead of two. The loom may be stopped and started in the normal way by the handle and the clutch and will be stopped as usual when weft breaks or when the warp protector acts. The other "off" position of the starting-handle is further to the left and the starting-handle slips into this position for shuttle-changing when allowed to do so by the operation of the extra lower weft fork lever (church lever). The control is usually by weft-feeler, which uses the ordinary weft-fork hammer, a slightly different shape of cam being fitted. The shuttle change could be operated by the weft fork when the weft breaks (by connecting the two levers by a

pin), but the pick-found cloth method using the feeler is usually preferred.

When the starting-handle is allowed to go into the shuttle-changing position a small toothed jaw clutch, which is behind the driving clutch, is allowed to engage, and commences to drive the shuttle-changing motion through the two chains. The loom is stopped with the cranks near the back centre. The brake used has two balanced shoes in front of and behind the flywheel and can easily stop the loom in the required position with very light spring loading. The small countershaft chain wheel has a pin-clutch and a light spring which will give way if there is any obstruction to the action of the shuttle-changing mechanism.

The changing mechanism comprises a camshaft placed a little behind the front loom rail, and the shaft carries three cams. The crown cam at the end of the camshaft is for the purpose of setting the loom on again when the change is complete. The top end of the vertical lever has an ingenious toggle-joint hook which snaps the starting-handle on and resets itself out of the way.

Two cams operate the four rods. The right-hand rod merely rocks the magazine trip lever to drop a shuttle on to the fingers below.

The first rod lifts the shuttle box front by acting on a toggle joint. It can only act if there is a shuttle in the box; otherwise the lever is locked by failure to operate the shuttle-box swell. The picker is also pressed back so that it clears the tip of the shuttle.

The second rod then operates two fingers which come through the back of the box and push the shuttle out so that it falls into a bin.

The third arm then carries the new shuttle across from the magazine and places it in the shuttle box. This rod and the carrier fingers are spring mounted both vertically and for backward movement. The carrier operates by feeling against the slay, quite a large excess of movement being allowed. However, if it fouled a shuttle the light drive of the changing motion would slip.

The first rod then returns the box front to working position. The toggle joint is held a little behind its dead centre and the box is locked in working position. The picker is released and makes contact with the new shuttle.

Then the loom is restarted, the positions being such that a good first pick is obtained. There is nothing critical about the position of the shuttle in the box or the distance from magazine to shuttle box, the relative height of the slay, or the precise point at which the loom has been stopped. The motion would not work if an entirely wrong adjustment of the brake caused the loom to stop too late or too early. The whole operation takes about four seconds.

The magazine is adjustable for length and width of shuttles, and the box front can be set for different widths of shuttle.

The main advantage is, of course, a most substantial saving in labour, and there is an increased loom efficiency. The shuttle-changing motion does not necessitate any change in cops, pirns, shuttles, pickers, or loom speeds. There is no call to rewind weft

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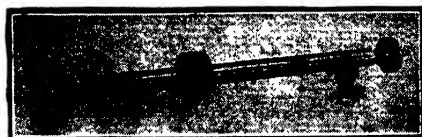
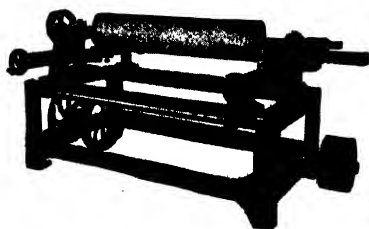
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in the interests of the motion. It has been used with complete satisfaction on a wide variety of looms, including artificial silk looms. There is no wear and tear with the motion, and the makers believe that the reduction in wear and breakages will more than offset the slight extra cost and small loss of time efficiency (due to stopping) as compared with non-stop bobbin-changing motions. The power taken is the same as for the loom without the motion.

(Textile Recorder.)

IMPROVEMENTS IN HIGH-SPEED DUST CAGES.

PLATT BROS. AND CO. LTD., OLDHAM.

The high-speed dust-extracting cage has become a standard accessory machine in the range of cotton-opening and cleaning machines. The extraction of dust from the thin layer of cotton, prior to treatment in the carding room, allows of brighter laps, clean and "bloomed" yarns, and an improved atmosphere in the cardroom.

The high-speed cage was a result of research, and further experiments and tests have led to many constructional improvements which are described in the current "Platt's Bulletin." In the construction of the improved high-speed cage, the arms in the end rings have been removed, and thus no obstruction is offered to the passage of dust on its way to the flues.

The flow of air and dust from the outside of the cage along the damper and up the side flues is "streamlined" by the special design of damper and flues. The result is that air pockets are eliminated and therefore dust and short fibres will not collect on the damper to any appreciable extent; also air friction losses are done away with. Elimination of the end covers allows more air to get inside the bottom of the cage and helps the stripping operation.

A special design of damper and side flues has been devised.

The fact that the damper is continuous makes it impossible for air to be drawn from the bottom half of the cage to the top half.

An entirely new system of drive has been introduced. It consists of a small "V" grooved pulley driving the cage by "V" rope, the latter running in a groove on the periphery of one of the end rings of the cage. The cage rotates on dustproof ball-bearing bowls and, as there are no bearing shaft and arms at the end of the cage, the damper is continuous and is carried forward into the side flues.

The damper and cage can be removed for cleaning by simple hand unscrewing of knurled thumbscrews, and then replaced without disturbing of the setting. The machine is perfectly safe, and no damage can be done by the machine while it is running. The advantages of the new designs are increased efficiency, together with accessibility and ease of cleaning. The power required to drive the cage is small.

(Textile Manufacturer.)

Grading Raw Cotton.

The following is extracted from a recent issue of the *Textile Recorder*:—

It has recently been discovered that the behaviour of cotton in polarized light is of such a peculiar nature that it allows the maturity of the cotton to be revealed quite accurately. It would appear, therefore, that along these lines a considerable simplification of cotton grading can be secured. In this article it is hoped to make clear how the microscope can be used in this special examination of cotton so that spinners can apply the methods described and ascertain their value for themselves.

Briefly it may be stated that by means of the polarizing microscope it is possible to observe a layer of cotton fibres and count the numbers of fully mature, half mature, and immature fibres present. Since the immature fibres cause waste in spinning and uneven dyeing in cotton goods it is obvious that this is a useful method for determining the grade of any particular cotton, and that if this is supplemented by a knowledge of the staple of the cotton, then the most essential characteristics of the cotton are known. The basis of the new method lies in the fact that each fibre is double refracting and on this account polarizes light passing through it, or in other circumstances allows polarized light to pass through it only under certain conditions. In this behaviour, immature and mature cotton fibres differ so definitely that they can be readily differentiated from each other.

For the microscopical purposes here referred to it is preferable to use a so-called Nicol's prism which consists of two portions of a crystal of Iceland spar cemented together in a special manner with Canada balsam. Light passing through this is polarized. A Nicol's prism is placed in the substage of the microscope so that any object under examination is viewed with polarized light instead of ordinary light. Also, a Nicol's prism is placed in the eyepiece of the microscope so that the object is viewed through the prism, which allows transmission of the light through the object only under certain conditions. If an object is under examination and the Nicol prism in the eyepiece is slowly rotated in one direction then the object will generally become less brilliant until, when rotation through a right angle has taken place, it is totally extinguished. With further rotation the object becomes visible and reaches a maximum brightness when the rotation has reached a further right angle. The same changes take place on further rotation.

If the Nicol prisms are rotated whilst no object is under examination until there is total extinction of light, the prisms are then said to be crossed, and if a cotton fibre is then placed on the object glass, it will at once be noticed that the fibre becomes visible. This is because the cotton fibre has the power of double refraction and thus changes the plane of the polarized light passing upwards from the lower Nicol so that it can pass through the upper prism.

Stubbs

Patent Quick Traverse Doubler Winder

The speed of winding drums and traverse rods can be independently changed without alteration to the driving pulley

Various forms of Creels and Tension Arrangements are supplied, according to requirements

An Improved Stop Motion immediately operates when the thread breaks or terminates

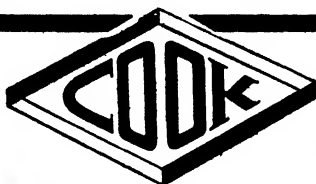
Movable Brakes automatically take the thread out of the reciprocating guide when a stoppage of the spool occurs



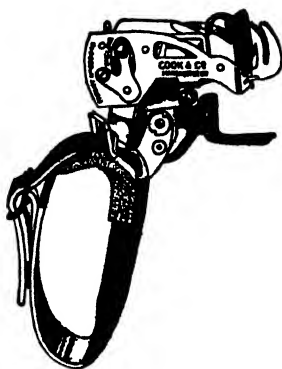
MAKERS OF ALL TYPES OF MACHINERY FOR WINDING, DOUBLING, CLEARING, GASSING, REELING, PREPARING, POLISHING, & BUNDLING ALL CLASSES OF YARNS AND THREADS

JOSEPH STUBBS LTD., MILL STREET WORKS,
ANCOATS, MANCHESTER

Another



Speciality



PATENT AUTOMATIC WEAVER'S KNOTTER

THIS machine ties the flat or Weavers' Knot, and is used in winding for trades where the ordinary knot is too bulky, such as folded gassed yarns, wool and mixture yarns.

COOK & CO., Manchester, Ltd.,
18, EXCHANGE ST., MANCHESTER.

Also, if at the same time there is present a selenite plate between the cotton fibre and the upper Nicol prism then the cotton fibre will appear coloured, sometimes differently coloured along its length, and varying mainly from blue to green and yellow. Mature and immature fibres differ by showing different colours under these circumstances.

Turning now to the cotton fibre itself, it has been established that this consists of cellulose in different states of orientation and aggregation. Firstly there is the skin or cuticle, which is very thin, and immediately under this is a primary wall constituting only about 9 per cent. of the entire fibre (G. G. Osborne; Text. Research, 1935, 5, 282). Next to the primary wall is the secondary thickening, and this is the major constituent of the normal cotton fibre. Careful examination of the primary wall and the secondary thickening (both of cellulose) has shown that in the former the cellulose is not specially oriented with regard to the fibre axis, but in direct contrast, the latter is spirally orientated. On this account the primary wall and the secondary thickening behave differently when viewed through the polarizing microscope, especially in the fact that when the primary wall is being viewed between the Nicol prisms it is possible to rotate it and obtain total extinction of the light at a certain angle, whereas no matter how much the secondary thickening is rotated certainly no total extinction and in fact only a slight dimming of the light is obtainable.

Having now regard to the fact that an immature cotton fibre is one which consists entirely of cuticle and primary wall so that it lacks secondary thickening, and that a mature fibre consists mainly of secondary thickening, it will be possible to understand the following difference in behaviour between the two types of cotton fibre. When a normal mature fibre is viewed through the microscope so that the Nicol prisms are crossed (this would give total extinction without the presence of the cotton fibre) and there is present a selenite plate suitably placed, then the fibre appears yellow to yellow-green throughout its length, and this colour does not change appreciably when the fibre is rotated gradually through a right angle. On the other hand, when the cotton fibre is immature it appears purple or deep blue or these colours in alternation along its length, and if the fibre is rotated through a right angle the colours change to orange or yellow. Partially immature fibres appear blue or blue-green or both, and on rotation these colours change to yellow. Further, the immature fibres "extinguish" at a certain point in their rotation, whilst the partially immature and mature fibres do not suffer this change.





Cotton Ginners who are anxious to reduce labour costs and obtain greater certainty of operation should write for this comprehensive catalogue.

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64 PAGES

profusely illustrated and packed with up-to-date valuable information for all cotton ginners.

This new and interesting catalogue illustrates and describes ginning machinery for all types and varieties of seed cotton, together with the latest cleaning and pneumatic conveying methods.

Particular attention is called to Platt's new Ball and Roller Bearing Single Action Knife Gin. This is proving wonderfully economical in operation, in power saving, and in smooth running.

PLATT Brothers & Co. Ltd.

OLDHAM, ENGLAND

INTERNATIONAL COTTON STATISTICS

The present tabulation is the **FINAL** result of the Census of Cotton Consumption in the Cotton Spinning Mills of the countries making returns for the half year ended 31st July, 1936, and of Cotton Mill Stocks on that date. It should be borne in mind that the figures published herewith relate to raw cotton only, and do not contain linters or waste cotton of any kind whatsoever. The spindle figures refer to raw cotton spinning spindles only and contain no waste or doubling spindles.

Owing to both the Italian and German Associations being precluded by official restrictions from supplying statistical information, and the continued omission of Russia to send returns in spite of repeated applications, the International Cotton Committee has decided that, for the present, no useful purpose would be served in attempting to issue figures purporting to show the World's Total Mill Consumption and Stocks. On this occasion we have been unable to obtain returns from Spain.

Estimates have been prepared for Russia and Spain, but it has not been deemed advisable to make any estimates for Germany and Italy.

The International Committee hopes, however, that the statistics supplied in respect of those countries making returns—which it is intended to issue as before—will be of comparative value with those issued for previous years.

In publishing the following tabulations of cotton mill consumption and stocks therefore, the International Committee wishes it to be clearly understood that they are not submitted as World tabulations, but only in order to furnish some guide to the present position of cotton consumption and stocks in those countries making returns.

The total Cotton Mill Consumption for the Year ended 31st July, 1936, in countries which have furnished returns, compared with that of the same period of the previous year, is as follows: In order to make them comparable, tabulations are exclusive of Germany and Italy in all cases:

	31st July 1936	31st July 1935	Increase or Decrease over previous year
	bales	bales	bales
American Cotton ..	11,815,000	10,398,000	+ 1,417,000
East Indian Cotton ..	5,390,000	5,414,000	— 24,000
Egyptian Cotton ..	997,000	990,000	+ 7,000
Sundries	7,187,000	6,828,000	+ 359,000
All kinds of Cotton ..	25,389,000	23,630,000	+ 1,759,000

The total Cotton Mill Stocks on 31st July, 1936 and 1935, in countries reporting, according to Continental distribution, were as follows: In order to make them comparable, tabulations are exclusive of Germany and Italy in all cases:

American Cotton:

Europe ..	319,000 bales against 339,000 bales on 31st July, 1935.
Asia ..	233,000 " " " " " "
America ..	915,000 " " " " " "

The total Mill Stocks of American Cotton on 31st July, 1936, were 1,475,000 bales, as against 1,531,000 bales in the year 1935.

East Indian Cotton:

Europe ..	279,000 bales against 261,000 bales on 31st July, 1935.
Asia ..	1,266,000 " " " " " "

Altogether the Mill Stocks of East Indian Cotton were 1,557,000 bales against 1,454,000 twelve months ago.

Egyptian Cotton :

Europe ..	150,000 bales against	143,000 bales on 31st July, 1935.
Asia ..	38,000 " " "	55,000 " " " "
America ..	19,000 " " "	22,000 " " " "

The total Mill Stocks of Egyptian Cotton were 221,000 bales against 226,000 bales twelve months ago.

Sundry Cottons :

Europe ..	474,000 bales against	538,000 bales on 31st July, 1935.
Asia ..	472,000 " " "	339,000 " " " "
America ..	144,000 " " "	103,000 " " " "

The Total Mill Stocks of all kinds of cotton on July 31st, 1936, in countries reporting, were 4,469,000 bales against 4,329,000 bales on July 31st, 1935.

The World's Total Spindles on July 31st, 1936, inclusive of Germany and Italy, showed 151,745,000 as against 153,133,000 in January last.

N. S. PEARSE,

Manchester, 5th September, 1936.

General Secretary.

SHORT-TIME TABLE

The spindle-hours stopped by the mills reporting, when worked out over the whole industry of each country, indicate the following stoppages in weeks of 48 hours, for the industries in the countries tabulated below :—

	Half-year ending	
	July 31st, 1936.	Jan. 31st, 1936
Great Britain	5.64*	6.16*
France	5.45†	7.21†
Germany	No reply	No reply
Italy	No reply	No reply
Czecho-Slovakia	5.88	7.88
Belgium	3.40	3.37
Poland	3.05	2.31
Switzerland	4.30	4.25
Holland	4.06	3.83
Austria	5.11	2.67
Sweden	1.18	1.16
Portugal	None	None
Finland	None	None
Hungary	0.36	1.20
Yugo Slavia	None	None
Denmark	10.30	0.43
Norway	1.22	1.84
Japan	17.72†	16.57†
China	13.92**	13.97**
Canada	3.19	3.78
Mexico	0.68	0.46
Brazil	1.25	0.99

U.S.A. In July, 1936, 23,250,000 spindles were active out of a total of 28,157,000 as compared with 23,324,000 active last January.

* The stoppage of the American Section amounted to 6.27 (7.30) weeks, and that of the Egyptian Section to 4.87 (5.28) weeks of 48 hours. There were 46 (51) firms with 2,233,552 (2,533,020) spindles in the American Section completely stopped during the period under review. In the Egyptian Section 5 (5) firms with 305,192 (414,696) spindles were completely stopped during the six months. Firms with 204,600 (232,740) spindles have closed down indefinitely during the period under review.

† This figure represents working weeks of 48 hours. The general working week in Japan is 120 hours. Calculated in Japanese working weeks the stoppage is equal to 7.09 (6.63) weeks for the last six months under review.

** The working week in China is 132 hours. Calculated in Chinese working weeks the stoppage is equal to 5.06 (5.08) weeks for the period under review.

‡ France: 1,111,861 (1,945,970) spindles have been completely stopped during the past six months.

(Figures in brackets and in *italic* refer to previous six months.)

Estimated COTTON MILL CONSUMPTION with previous figures for comparison, on basis of Spinners'

COUNTRIES		IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half-year ending				Half-year ending			
		July 31 1935	Jan. 31 1936	July 31 1935	July 31 1934	July 31 1935	Jan. 31 1936	July 31 1935	July 31 1934
EUROPE :—									
(1)	Great Britain ..	733	645	516	690	196	190	172	125
(2)	France ..	357	307	269	346	95	106	100	92
(3)	*Germany ..	?	?	?	513	?	?	?	103
(4)	†Russia ..	59	52	44	25	—	—	—	10
(5)	*Italy ..	?	?	232	305	?	?	92	71
(6)	Czecho-Slovakia ..	131	113	91	114	30	23	22	17
(7)	Belgium ..	74	78	62	68	62	68	61	39
(8)	**Spain ..	79	104	116	118	16	26	34	34
(9)	Poland ..	108	111	92	106	3	11	8	11
(10)	Switzerland ..	14	15	17	22	5	6	6	5
(11)	Holland ..	42	41	36	62	22	22	17	18
(12)	Austria ..	49	51	38	42	12	21	11	7
(13)	Sweden ..	60	56	55	59	—	1	—	1
(14)	Portugal ..	19	23	20	21	2	1	—	—
(15)	Finland ..	25	25	22	23	—	—	—	—
(16)	Hungary ..	29	23	23	28	7	6	4	5
(17)	Yugo Slavia ..	20	15	17	20	15	14	10	11
(18)	Denmark ..	14	17	15	16	—	—	—	—
(19)	Norway ..	6	6	5	5	—	—	—	—
	Total ..	1,819||	1,682||	1,670†	2,583	465||	495||	537†	549
ASIA :									
(1)	India ..	21	49	45	14	1,351	1,266	1,236	1,123
(2)	Japan ..	772	842	846	900	844	821	856	619
(3)	China ..	39	70	104	176	31	39	56	88
	Asia Total ..	,832	961	995	1,090	2,226	2,126	2,148	1,830
AMERICA :									
(1)	U.S.A. ..	3,263	2,947	2,612	2,707	30	25	14	9
(2)	Canada ..	121	117	106	109	—	—	—	—
(3)	Mexico ..	—	—	—	3	—	—	—	—
(4)	Brazil ..	—	—	—	—	—	—	—	—
	America Total ..	3,384	3,064	2,718	2,819	30	25	14	9
	Other Countries ..	33	40	26	21	14	9	11	15
	HALF-YEAR'S TOTAL ..	6,068||	5,747||	5,409†	6,513	2,735||	2,655||	2,710†	2,403

* No returns received.

† No returns from Russia. Figures for this country are estimated from trade sources

** No returns from Spain July, 1936. Figures for July, 1936 estimated.

for the Half-year ending 31st July, 1936,
returns made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES (regardless of weight)											
EGYPTIAN				SUNDRIES				TOTAL			
Half-year ending				Half-year ending				Half-year ending			
July 31 1936	Jan. 31 1936	July 31 1935	July 31 1934	July 31 1936	Jan. 31 1936	July 31 1935	July 31 1934	July 31 1936	Jan. 31 1936	July 31 1935	July 31 1934
175	181	181	177	281	332	387	206	1,385	1,348	1,256	1,198
70	72	66	57	77	96	93	38	599	581	528	533
?	?	?	83	?	?	?	78	?	?	?	777
—	—	—	—	914	1,038	1,021	1,032	973	1,090	1,065	1,067
?	?	50	40	?	?	23	5	?	?	397	421
21	21	16	16	19	23	11	9	201	180	140	156
3	5	5	3	43	69	64	24	182	220	192	134
21	34	39	23	14	23	16	6	130	187	205	181
16	14	15	15	13	11	8	2	140	147	123	134
19	19	19	19	8	6	5	2	46	46	47	48
1	1	1	—	53	51	44	15	118	115	98	95
9	9	7	6	19	20	15	4	89	101	71	59
3	3	3	2	1	1	2	—	64	61	60	62
3	3	3	2	15	10	10	16	39	37	33	39
1	1	1	1	2	3	4	—	28	29	27	24
7	8	7	5	20	9	6	1	63	46	40	39
5	3	2	1	5	7	4	1	45	39	33	33
—	—	—	—	1	1	1	1	15	18	16	17
—	—	—	—	—	1	1	—	6	7	6	5
354	374	415†	450	1,485	1,701	1,715†	1,440	4,123	4,252	4,337†	5,022
18	36	41	23	141	130	118	96	1,531	1,481	1,440	1,256
43	43	50	30	198	88	103	121	1,857	1,794	1,855	1,870
12	12	13	9	1,073	1,064	1,000	920	1,155	1,185	1,173	1,293
73	91	104	62	1,412	1,282	1,221	1,137	4,543	4,460	4,468	4,119
22	23	24	32	13	6	10	15	3,328	3,001	2,660	2,763
3	6	6	5	2	—	—	—	126	123	112	114
—	—	1	1	93	111	90	94	93	111	91	98
—	—	—	—	337	317	275	280	337	317	275	280
25	29	31	38	445	434	375	389	3,884	3,552	3,138	3,255
37	14	13	14	243	185	208	132	327	248	258	182
489	508	563†	564	3,585	3,602	3,519†	3,098	12,877	12,512	12,201†	12,578

‡ Exclusive of Germany and Italy.

† Exclusive of Germany.

Estimated COTTON MILL STOCKS on comparison on basis of Spinners' returns

COUNTRIES		IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half-year ending				Half-year ending			
		July 31 1936	Jan. 31 1936	July 31 1935	July 31 1934	July 31 1936	Jan. 31 1936	July 31 1935	July 31 1934
EUROPE :									
(1)	Great Britain ..	54	61	47	56	69	29	58	56
(2)	France ..	88	93	84	104	98	67	108	105
(3)	*Germany ..	?	?	?	120	?	?	?	49
(4)	†Russia ..	6	—	52	3	—	—	—	4
(5)	*Italy ..	?	?	120	160	?	?	62	55
(6)	Czecho-Slovakia ..	29	43	21	40	12	7	11	8
(7)	Belgium ..	32	31	21	32	44	30	45	39
(8)	**Spain ..	15	17	14	17	5	4	5	5
(9)	Poland ..	12	6	6	12	2	2	1	4
(10)	Switzerland ..	11	18	13	20	8	3	7	10
(11)	Holland ..	18	24	21	42	18	6	14	16
(12)	Austria ..	9	12	9	15	4	4	4	3
(13)	Sweden ..	19	25	26	29	—	—	—	—
(14)	Portugal ..	3	5	5	5	1	—	—	—
(15)	Finland ..	5	5	4	4	—	—	—	—
(16)	Hungary ..	6	7	4	4	6	1	2	3
(17)	Yugo Slavia ..	4	7	4	8	12	10	6	6
(18)	Denmark ..	5	7	6	5	—	—	—	—
(19)	Norway ..	3	2	2	3	—	—	—	—
Europe Total		319||	363||	459†	679	279||	163||	323‡	363
ASIA :									
(1)	India ..	9	16	39	13	932	627	857	935
(2)	Japan ..	205	214	299	306	310	124	305	296
(3)	China ..	19	18	37	54	24	5	21	51
Asia Total		233	248	375	373	1,266	756	1,183	1,282
AMERICA :									
(1)	U.S.A. ..	856	1,404	749	1,175	8	7	8	9
(2)	Canada ..	59	56	57	69	—	—	—	—
(3)	Mexico ..	—	—	—	—	—	—	—	—
(4)	Brazil ..	—	—	—	—	—	—	—	—
America Total		915	1,460	806	1,244	8	7	8	9
Other Countries		8	18	11	11	4	1	2	1
HALF-YEAR'S TOTAL		1,475||	2,089||	1,651‡	2,307	1,557||	927||	1,516‡	1,655

* No returns received.

† No returns from Russia. Figures for this country are estimated from trade sources.

** No returns from Spain July, 1936. Figures for July, 1936, estimated.

31st July 1936, with previous figures for
made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES (regardless of weight)											
EGYPTIAN				SUNDRIES				TOTAL			
Half-year ending				Half-year ending				Half-year ending			
July 31 1936	Jan. 31 1936	July 31 1935	July 31 1934	July 31 1936	Jan. 31 1936	July 31 1935	July 31 1934	July 31 1936	Jan. 31 1936	July 31 1935	July 31 1934
51	65	51	64	69	60	80	62	243	215	236	238
51	49	46	38	63	59	50	45	300	268	288	292
?	?	?	24	?	?	?	24	?	?	?	217
—	—	—	—	263	356	389	362	269	356	441	369
?	?	32	37	?	?	15	8	?	?	229	260
8	12	6	7	5	8	7	3	54	70	45	58
2	2	2	2	17	20	21	19	95	83	89	92
8	11	9	7	3	5	4	2	31	37	32	31
3	1	3	2	2	1	2	3	19	10	12	21
14	19	16	15	8	7	6	2	41	47	42	47
1	1	2	—	22	22	14	7	59	53	51	65
4	4	2	4	6	5	5	1	23	25	20	23
2	3	2	2	1	1	1	1	22	29	29	32
1	2	—	1	5	5	2	3	10	12	7	9
1	1	—	—	1	1	1	—	7	7	5	4
3	3	4	1	4	3	1	1	19	14	11	9
1	1	—	—	5	4	3	—	22	22	13	14
—	—	—	—	—	1	—	—	5	8	6	5
—	—	—	—	—	—	—	—	3	2	2	3
150	174	175†	204	474	558	601†	543	1,222	1,258	1,558†	1,789
13	17	22	13	62	57	66	60	1,016	717	984	1,021
20	21	27	20	66	42	22	31	601	401	653	653
5	3	7	4	344	333	251	272	392	359	316	381
38	41	56	37	472	432	339	363	2,009	1,477	1,953	2,055
17	13	17	23	10	6	8	14	891	1,430	782	1,221
2	4	4	2	1	—	—	—	62	60	61	71
—	—	1	2	41	25	42	47	41	25	43	19
—	—	—	—	92	83	53	64	92	83	53	64
19	17	22	27	144	114	103	125	1,086	1,598	939	1,405
14	5	5	4	126	106	90	72	152	130	108	88
221	237	256†	272	1,216	1,210	1,133†	1,103	4,469	4,463	4,558†	5,337

‡ Exclusive of Germany and Italy

† Exclusive of Germany.

ESTIMATED TOTAL WORLD'S COTTON

years ended 31st July, 1936, and 31st Jan.,
the International

	COUNTRIES	TOTAL ESTIMATED NUMBER OF SPINNING SPINDLES		MULE SPINDLES	
		Half-year ended		Half-year ended	
		July 31, 1936	Jan. 31, 1936	July 31, 1936	Jan. 31, 1936
	EUROPE :				
(1)	Great Britain ..	41,391	42,307	30,387	31,262
(2)	France	9,932	10,016	2,403	2,428
(3)	Germany	10,109**	10,109**	3,263**	3,263**
(4)	Russia†	9,800	9,800	2,187	2,187
(5)	Italy	5,483‡	5,483‡	570‡	570‡
(6)	Czecho-Slovakia ..	3,562	3,611	1,450	1,502
(7)	Belgium	2,009	2,008	284	298
(8)	Spain	2,070	2,070	431	431
(9)	Poland	1,707	1,683	455	433
(10)	Switzerland	1,241	1,236	413	416
(11)	Holland	1,220	1,218	269	264
(12)	Austria	773	776	232	233
(13)	Sweden	592	604	44	48
(14)	Portugal	466	464	136	137
(15)	Finland	310	310	42	42
(16)	Hungary	304	301	37	47
(17)	Yugo Slavia	152	151	40	41
(18)	Denmark	99	100	—	—
(19)	Norway	48	48	8	9
	Total Europe ..	91,268	92,295	42,651	43,611
	ASIA :				
(1)	India	9,705	9,686	596	596
(2)	Japan	10,867	10,595	20	35
(3)	China	5,010	4,952	—	—
	Total Asia ..	25,582	25,233	616	631
	AMERICA :				
(1)	U.S.A.*	28,157	29,040	400	400
(2)	Canada	1,110	1,152	66	78
(3)	Mexico	862	862	7	7
(4)	Brazil	2,712	2,711	5	5
	Total America ..	32,841	33,765	478	490
	Other Countries ..	2,054	1,840	289	289
	Grand Total ..	151,745	153,133	44,034	45,021

* U.S.A.—The division between mule and ring and the number of spindles on Egyptian is only approximate.

† No return from Russia. Figures for this country are estimated from trade sources

‡ Figures for half-year ending July 31, 1935.

SPINNING SPINDLES (000's omitted) for the half-1936, on basis of returns made to Cotton Federation.

RING SPINDLES		SPINDLES SPINNING EGYPTIAN COTTON		SPINDLES IN COURSE OF ERECTION		
Half-year ended		Half-year ended		Half-year ended		
July 31, 1936	Jan. 31, 1936	July 31, 1936	Jan. 31, 1936	July 31, 1936	Jan. 31, 1936	
11,004	11,045	16,998	16,705	18	30	(1)
7,529	7,588	2,083	2,262	9	—	(2)
6,846**	6,846**	1,455**	1,455**	?	?	(3)
7,613	7,613	—	—	?	?	(4)
4,913†	4,913†	700†	700	?	?	(5)
2,112	2,109	667	628	4	2	(6)
1,725	1,710	51	72	1	2	(7)
1,639	1,639	207	207	—	—	(8)
1,252	1,250	344	336	5	—	(9)
828	820	739	650	1	3	(10)
951	954	23	23	—	—	(11)
541	543	127	161	—	—	(12)
548	556	37	36	8	—	(13)
330	327	45	44	9	5	(14)
268	268	28	25	1	—	(15)
267	254	62	52	8	—	(16)
112	110	32	20	12	—	(17)
99	100	—	—	—	—	(18)
40	39	—	—	1	—	(19)
48,617	48,684	23,598	23,376	77	42	
9,109	9,090	500	573	34	44	(1)
10,847	10,560	862	868	150	120	(2)
5,010	4,952	—	—	44	150	(3)
24,966	24,602	1,362	1,441	228	314	
27,757	28,640	1,000	1,000	?	?	(1)
1,044	1,074	78	91	—	—	(2)
855	855	5	—	3	—	(3)
2,707	2,706	—	—	2	2	(4)
32,363	33,275	1,083	1,091	5	2	
1,765	1,551	324	140	51	32	
107,711	108,112	26,367	26,048	361	390	

** Figures for six months ending July 31st, 1934.

TOTAL WORLD.

Date	Total Estimated Number of Spinning Spindles existing in world	ESTIMATED MILL STOCKS—In thousands of ACTUAL BALES (000's omitted) "INVISIBLE" SUPPLY					Per 1,000 Spindles Total, all kinds of Cotton
		AMERICAN	EAST INDIAN	EGYPTIAN	SUNDRIES	TOTAL	
Feb. 1, 1936†	153,133,000	2,089	927	237	1,210	4,463	29.14
" 1935*	155,157,000	2,084	1,214	281	1,192	4,771	30.77
" 1934	157,718,000	2,873	1,210	244	941	5,268	33.89
" 1933	158,984,000	2,609	832	208	803	4,542	28.57
" 1932	162,070,000	2,775	984	212	637	4,608	28.43
" 1931	163,571,000	2,427	1,212	202	745	4,586	28.04
" 1930	165,143,000	2,742	1,173	224	792	4,931	29.55
" 1929	165,104,000	2,958	1,216	182	938	5,294	32.06
" 1928	164,979,000	2,867	969	183	863	4,882	29.59
" 1927	164,616,000	2,982	829	173	771	4,755	28.88
Mar. 1, 1913	142,186,000	3,448	716	279	973	5,416	38.09
Aug. 1, 1936†	151,745,000	1,475	1,557	221	1,216	4,469	29.45
" 1935*	153,778,000	1,651	1,616	258	1,133	4,558	29.64
" 1934	156,878,000	2,307	1,655	272	1,103	5,337	34.02
" 1933	157,755,000	2,558	1,527	235	730	5,050	32.01
" 1932	161,002,000	2,543	1,031	228	660	4,462	27.71
" 1931	162,278,000	1,871	1,565	217	660	4,313	26.58
" 1930	164,108,000	1,985	1,667	237	609	4,498	27.41
" 1929	164,211,000	2,129	1,761	228	745	4,863	29.61
" 1928	165,103,000	2,112	1,728	170	777	4,787	28.99
Sept. 1, 1913	143,449,000	1,655	1,405	273	744	4,077	28.42

ESTIMATED COTTON MILL CONSUMPTION—In thousands
of ACTUAL BALES (000's omitted)

Half-year ending								
July 31, 1936†	151,745,000	6068	2735	489	3585	12877	84.86	166.57
Jan. 31, 1936†	153,133,000	5747	2655	508	3602	12512	81.71	
July 31, 1935*	153,778,000	5409	2710	563	3519	12201	79.34	165.12
Jan. 31, 1935*	155,157,000	5444	2889	521	3363	12217	78.78	
July 31, 1934	156,878,000	6513	2403	564	3098	12578	80.18	159.65
Jan. 31, 1934	157,718,000	7022	2369	544	2599	12534	79.47	
July 31, 1933	157,755,000	7323	2161	472	2514	12470	79.04	153.78
Jan. 31, 1933	158,984,000	6847	2059	462	2514	11882	74.74	
July 31, 1932	161,002,000	6202	1976	493	2121	10792	67.08	138.17
Jan. 31, 1932	162,070,000	6117	2812	487	2114	11530	71.14	
July 31, 1931	162,278,000	5630†	2850	459	2385	11324	69.75	133.00
Jan. 31, 1931	163,571,000	5278	3013	394	2479	11184	68.25	
July 31, 1930	164,108,000	5940	3102	435	2530	12007	73.16	153.10
Jan. 31, 1930	165,143,000	7083	2985	502	2632	13202	79.94	
July 31, 1929	164,211,000	7463	2804	492	2455	13014	79.25	187.19
Jan. 31, 1929	165,104,000	7613	2574	497	2184	12868	77.94	
Year ending								
Aug. 31, 1913	143,449,000	14630	3977	946	3447	23000	160.34	

* Consumption and stock figures exclusive of Germany.

† Consumption and stock figures exclusive of Germany and Italy

SPECIFICATION OF PART OF THE COTTON RETURNED AS "SUNDRIES" (IN ACTUAL BALES)
Six Months ending July 31st, 1936, estimated from Actual Returns.

CONSUMPTION

Country	Peruvian	Brazilian	Argentine	West Indian	Mexican	Turkish	Russian	Mesopotamian	Sudan	East African	West African	South African	Australian	Chinese	Others	Total
Great Britain ..	87,624	66,344	13,756	8,473	2,243	2,445	—	1,026	77,600	27,065	13,329	230	89	—	1,958	281,182
Germany† ..	—	—	—	—	—	701	—	—	4,677	—	23,593	—	—	—	16,712	76,849
France ..	2,724	25,987	2,455	—	—	—	—	—	—	—	—	—	—	—	—	42,562
Belgium ..	3,664	8,835	—	5	—	—	—	—	350	641	97,627	—	—	—	1,440	100,017
Switzerland ..	799	357	244	—	—	57	—	—	730	2,067	1,943	342	—	—	1,283	47,777
Poland ..	2,734	1,860	521	—	151	—	—	—	150	32	7,683	—	—	—	—	13,099
Holland ..	1,292	2,567	631	—	682	119	1	9	32	1,742	25,957	—	—	—	—	52,932
Czechoslovakia ..	1,253	2,364	73	—	139	186	—	—	469	—	10,792	18	—	43	—	62,938
Austria ..	286	2,211	238	—	—	63	—	—	—	191	16,017	—	—	—	—	19,006
China ..	—	—	—	—	—	—	—	—	—	—	—	—	—	1,072,107	—	1,073,886
Brazil ..	—	337,123	—	—	—	—	—	—	—	—	—	—	—	—	—	337,123
Mexico ..	—	—	—	—	93,218	—	—	—	—	—	—	—	—	—	—	93,218
Japan ..	—	—	—	—	—	—	—	—	—	22,450	—	—	—	32,992	—	198,189
Hungary ..	740	342	—	94	—	1,437	—	—	317	8	16,871	—	—	—	—	19,909
India ..	4,327	—	32	243	—	—	—	61	9,789	72,026	2,648	10,301	—	—	—	140,875
	85,442	446,990	17,950	8,815	96,433	5,008	1	1,096	94,114	128,190	149,365	10,391	89	1,105,142	226,830	2,374,357

189 Saigon & Annam
 138 Korean
 81,039 Others
 27,309 Other African
 15,939 Others

STOCKS

Country	Great Britain	Germany	France	Belgium	Switzerland	Holland	Czechoslovakia	Austria	China	Brazil	Mexico	Hungary	India	Total
Great Britain ..	3,094	10,241	1,899	6,177	223	843	—	163	32,003	7,859	1,165	61	23	68,822
Germany ..	1,809	20,773	904	1,834	—	950	—	—	11,160	—	12,689	—	—	63,099
France ..	1,488	5,288	4	—	—	—	—	—	440	83	9,244	—	—	17,981
Belgium ..	645	886	30	—	—	18	—	—	1,198	2,562	789	693	—	7,837
Switzerland ..	670	736	—	—	—	—	—	13	725	35	1,275	—	—	2,144
Holland ..	1,316	1,953	—	—	467	—	—	16	35	1,275	2,481	402	—	22,017
Czechoslovakia ..	287	850	—	—	3	110	—	—	563	213	4,019	—	—	5,160
Austria ..	31	1,208	154	—	—	38	—	—	—	—	—	—	—	5,663
China ..	—	—	—	—	—	—	—	—	—	—	—	—	—	344,467
Brazil ..	—	91,708	—	—	—	—	—	—	—	—	—	—	—	91,708
Mexico ..	—	—	—	—	—	—	—	—	—	—	—	—	—	40,745
Hungary ..	68	126	—	41	—	168	—	—	143	83	3,723	—	—	4,852
India ..	2,179	—	48	38	—	—	—	52	4,932	30,267	1,394	1,482	—	62,167
	10,567	133,569	3,039	8,090	41,498	2,182	140	244	51,199	42,342	46,793	5,638	23	785,402

† No reply.



THE COTTON INDUSTRY IN YUGO-SLAVIA.

The following is contained in a report on economic and commercial conditions in Yugo-Slavia, prepared by Mr. H. N. Sturrock, Commercial Secretary to H.M. Legation at Belgrade, and published by the Department of Overseas Trade:—

The six Yugo-Slav cotton-spinning mills, all but one of which are situated in the northern provinces, have been working at full capacity in the endeavour to supply the special demand for yarn created since the cessation of imports from Italy. Plans exist for their extension and a new mill is to be opened in Old Serbia. Generally speaking, the counts locally produced are those from 10's to 30's.

The question of the development of Yugo-Slav cotton production with a view to adapting it to industrial requirements is now occupying attention. Only about 1,350 hectares are at present under cotton, and the yearly production is approximately 600 tons, or roughly 2 per cent. of the requirements of the Yugo-Slav spinning mills. Much study will be necessary before it can be hoped to bring about any great improvement in the quality of Yugo-Slav cotton, which is of very low grade. Efforts to introduce foreign strains have not so far been successful as the majority of types have been found unsuited to the comparatively temperate climate of the Yugo-Slav cotton-growing areas.

The cotton industry employs about 150,000 spindles and 12,000 looms, and supplies a large proportion of the home demand for the cheaper types of cotton fabrics. The cessation of imports from Italy has given a certain stimulus to the weaving mills but, on the other hand, lack of cotton yarns, which were previously supplied by Italy, has recently caused great difficulty.

PORTUGAL.

The following extract is taken from a report upon the economic and commercial conditions in Portugal, prepared by the Commercial Secretary to H.M. Embassy in Lisbon, and published by the Department of Overseas Trade:—

Since November, 1935, the situation has been dominated by the phenomenal rainfall lasting until April, which had the effect of

causing acute distress and restricting purchasing power. Mills, most of which have been working short time, have remained fully stocked. Supplies held by wholesale warehouses have been high, and there has been no demand on the part of retailers who have found sales disappointing. There has been no evidence of a revival in trade with Portuguese West Africa, while the limited business with East Africa has been transacted at cut prices. In both these colonies competition from Japanese goods is being severely felt. The national production of cotton fabrics continues to improve, and imports are more than ever limited to specialties and luxury products. It may almost be said that in 95 per cent. of the trade the article of local manufacture is satisfactorily substituting the imported article. Imports of raw cotton in 1935 were 23,441 tons as against 14,786 tons in 1931.

The increase in the production of cotton yarns is noticeable, particularly in the case of mills spinning the finer counts. Hosiery and the finer quality shirtings and materials are the only articles manufactured locally from imported yarn, but the market is now a very reduced one, as its needs are being gradually met by the locally-spun yarn. The following figures relating to the local cotton spinning and weaving industry are approximate. Production and wages are based on a working day of eight hours and week of 48 hours:—

Spindles in use	350,500
Mechanical looms in use	16,100
Production in 1935 of cotton goods	147,614,400 metres
Value of manufactured goods	£6,709,000
Number of hands employed	28,150
Wages paid in 1935	£470,000

THE FRENCH COTTON INDUSTRY.

The dispute in the Lille textile industry, which began on September 9, involved about 35,000 workers, the main points at issue being a demand for an advance in wages of 10 per cent. and a difference respecting the method of appointment and payment of workers' delegates (shop stewards). An agreement was reached on September 17, the terms of settlement providing for an immediate general increase in wages of 6 per cent., a readjustment of average wages in an upward direction, and minimum hourly wage rates of 2.30 francs for women and 3.15 francs for men. It was agreed that a formula should be established for the future regulation of wages in accordance with fluctuations in the cost of living; the method of election and payment of workers' delegates was also determined. The strike in the Vosges textile industry, which also began early in the month, affected approximately 30,000 workers and arose on a question respecting wages. A settlement was effected on September 25 by the granting of wage increases ranging from 10 per cent. for the highest to 100 per cent. for the lowest paid workers.

(The Ministry of Labour Gazette.)

EGYPTIAN COTTON YARN PRICES IN ENGLAND.

The sub-committee of the Federation of Master Cotton Spinners' Associations, which has been engaged in drawing up a legally enforceable price agreement for Egyptian-type yarns, has agreed on proposals. The scheme is designed to regulate the margins on various counts of Egyptian cotton yarns. The sub-committee is to meet representatives of the Bolton spinners with a view to securing unanimity on the plan before its incorporation in a legally binding document for signature by the firms.

RESPIRATORY DUST DISEASE IN THE COTTON INDUSTRY.

The British Medical Research Council have published a report upon investigations into respiratory dust disease among operatives in the cotton industry.* The investigation was carried out at the request of the Home Office, and with the co-operation of the employers' organizations and trade unions concerned, at the University of Manchester.

Much dust is produced in the early stages of cotton manufacture, and it has long been known that operatives exposed to this dust have an unusually high mortality from bronchitis. Much has been done in recent years to reduce the amount of dust in the atmosphere of the blowing rooms and of the cardrooms of cotton factories, by the use of ventilating and exhaust appliances which remove the coarser particles of dust from the atmosphere. These appliances, however, do not prevent the escape of the finer particles of dust; and the present Report suggests that it is precisely these particles which are particularly liable to produce irritation of the respiratory system in those susceptible to the dust. The present investigation also appears to have identified the particular substance contained in the dust that is especially injurious.

WAGES IN THE FINISHING INDUSTRY IN U.S.A.

The United States Bureau of Labour Statistics recently undertook a survey of earnings in the textile dyeing and finishing industry in the United States, and the results of this survey, as regards the cotton and the silk and artificial silk branches of the industry, were published in summary form in the issue for May, 1936, of the official *Monthly Labour Review*. The table (p. 161) shows the average hourly and weekly earnings in these branches as a whole and in certain of the more important occupations at August, 1934, as ascertained by the Bureau. The averages are based on information relating, in the case of cotton goods, to 13,058 workers

* *Medical Research Council: Special Report Series, No. 212.* . H.M. Stationery Office; price 2s. 6d. net (2s. 8d., post free).

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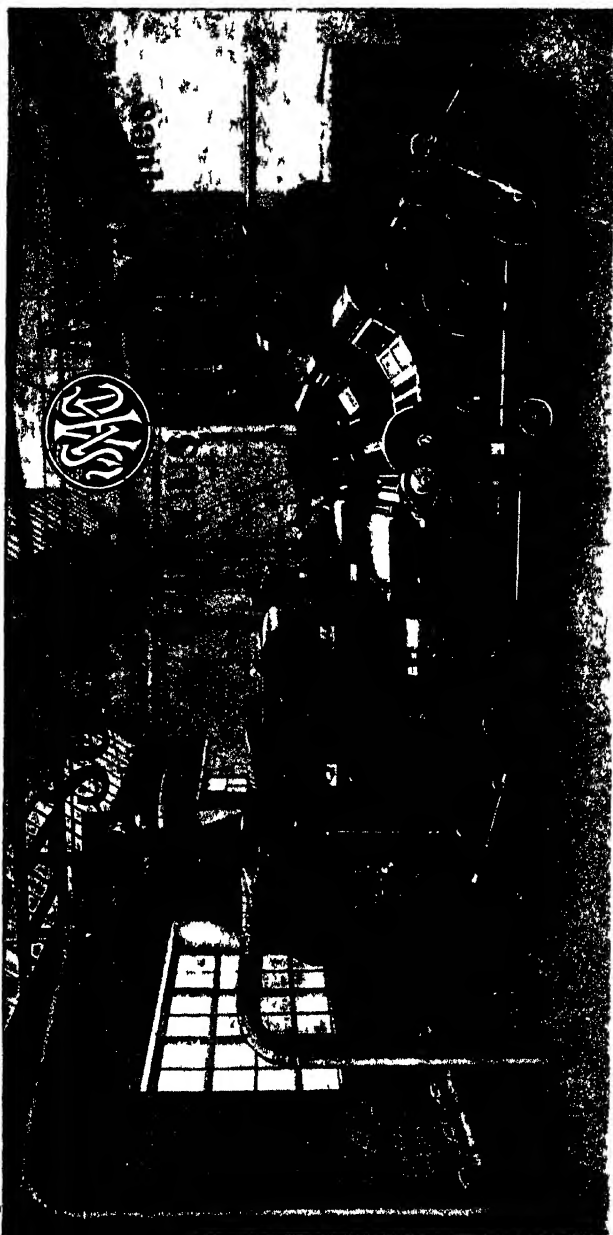
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(10,528 males and 2,530 females) and, in the case of silk and artificial silk goods, to 4,873 workers (4,306 males and 567 females).

Occupation	Cotton goods		Silk and artificial silk goods	
	Average hourly earnings	Average weekly earnings	Average hourly earnings	Average weekly earnings
	Cents	Dollars	Cents	Dollars
Male workers :				
Foremen, working	74.7	29.93	84.6	33.72
Dyeing-machine tenders, cloth ..	48.0	14.95	58.7	20.59
Tenter-frame tenders	46.2	15.39	58.3	19.63
Calender tenders	44.1	14.69	58.9	21.60
Labourers, dye-house	42.8	14.65	56.6	15.27
Drier tenders, cloth	42.7	14.79	57.7	18.39
Dyeing-machine tenders, yarn ..	42.5	14.27	57.7	19.82
Washer tenders	41.1	13.17	58.0	14.91
Truckers, hand	41.0	14.30	57.8	17.78
Labourers (other than dye-house)	38.3	12.96	59.8	19.79
All occupations* (including some not shown above)	49.5	17.32	61.7	20.01
Female workers :				
All occupations*	40.1	12.46	43.8	14.05
Male and female workers :				
All occupations*	47.8	16.38	59.6	19.32

(Ministry of Labour Gazette.)

* Including some clerical workers.

BULGARIA.

The cotton textile industry is steadily increasing its output. Approximately 90,000 spindles and more than 3,000 looms were active in August and it was reported that about 10,000 new spindles have been ordered. (*United States Department of Commerce.*)

MEXICO.

The total value of production in the cotton spinning and weaving mills during the calendar year 1934 was reported as 165,341,000 pesos, according to data recently published by the Ministry of National Economics. Of this amount, cotton piece goods accounted for 97,760,000 pesos, or 59 per cent. The State of Puebla produced the greatest amount of cheap cotton cloth—97,299,000 metres, or about 40 per cent. of the total output of this class of goods. In the production of fancy cloth and coloured drills, the State of Vera Cruz ranked first with an output of 16,711,000 metres of fancy cloth and 7,501,000 metres of coloured drills, representing approximately 44 and 41 per cent. respectively,

of the nation's output of these goods. Mills in the Federal District turned out the largest quantity of dyed cotton fabrics—20,836,000 metres, or about one-third of the country's total production of this line.

(United States Department of Commerce.)

INDIAN COTTON MILL WAGES.

It is reported that the Ahmedabad Millowners' Association has decided to reduce wages by 20 per cent. They contend that wages in Ahmedabad are higher than those in Bombay by between 25 per cent. to 33 per cent. It is stated that during the last year or so nine mills have closed down, and about eleven have had to discontinue night-shifts. The growth of mills in other towns in India has affected Ahmedabad's trade.

IRAN.

A cotton mill with 2,000 spindles and 700 looms is to be erected by a group of merchants at Isfahan, according to local reports. The mill will produce print cloth and the concern apparently plans to print and finish the cloth. The country now has 130,000 spindles, it is claimed.

(United States Department of Commerce.)

Japanese Export Control of Cotton Piece Goods.

*Reproduced from the September, 1936, issue of
"The Oriental Economist."*

THE article states that with regard to the establishment of export associations, in the case of Japanese piece goods there are at present 13 associations, of which the oldest, the Japan Association for Export of Striped Drills, was established in October, 1930.

Each of these associations was legally organized under the law of Export Association. In addition, there is the Trade Association for the Export of Cotton Yarn and Piece Goods, an autonomous organ for the promotion of the export trade, which was established in April, 1921, as a forerunner of cotton piece goods export associations.

These 13 export associations have in the past exercised control over the trade along their respective lines. In the absence of unity and co-ordination between these organizations, their spheres of

operation doubly and trebly overlapped one another in one direction, while, in others, their controlling influence failed to extend to some of the world markets. In view of this state of trade control, it has been decided, on the one hand, that early measures will be taken to adjust and reorganize the export associations to the end of creating an allied export association as the highest organ charged with the complete control of the export trade in cotton piece goods as a whole, and, on the other, that the Government will deal fundamentally with the matter by framing a legislative measure for the control of foreign trade and submit it to the coming Diet. In the former direction, the initial effort was taken on August 4 when official and private representatives met in council and decided on an increase of the objective markets to be handled by the cotton piece goods export associations as for specified countries, and also on the institution of an allied association by combining these existent organizations. To state in detail the lines decided upon on the same occasion, the Association for the export

EXPORT ASSOCIATIONS.

Name	Date of establishment.
(1) By Markets	
Association for Export of Cotton Piece Goods to India	Mar. 17, 1934
Association for Export of Cotton Piece Goods to the Dutch Indies	Sep. 18, 1934
Association for Export of Cotton Yarn and Piece Goods to Central and South America	April 20, 1935
Association for Export of Yarn and Piece Goods to Africa and Near East	July 25, 1935
Association for Export of Japanese Cotton Piece Goods to the Philippines	Sep. 3, 1935
(2) By Groups of Merchandise	
Association for Export of Striped Drills ...	Oct. 31, 1930
Association for Export of Cotton Yarn, Dyed Clothing and Sarongs	Nov. 30, 1934
(3) By Localities	
Nagoya Association for Export of Textiles...	Dec. 3, 1931
Osaka Association for Export of Textiles ...	Dec. 4, 1931
Kobe Association for Export of Cotton Piece Goods and Yarn Products	April 22, 1933
Kyoto Association for Export of Textiles ...	April 12, 1934
Tokyo Association for Export of Textiles ...	Aug. 11, 1934
Yokohama Association for Export of Cotton Piece Goods and Yarn Products	Aug. 11, 1934

of cotton piece goods to Africa and the Near East will include Europe; the Association for export to British India will include Afghanistan, Baluchistan and Ceylon; the Association for export to the Netherlands East Indies will include Siam, Malay and French Indo-China; the Association for export to the Philippines will add to its list of places Manchuria, China, Hongkong and Soviet Asia;

and with regard to Australia and New Zealand, which have both remained outside associate control, there will be set up a new association styled "The Association for the Export of Cotton Piece Goods to Oceania"; and, finally, all these six associations will form among them the Japan Federation of Cotton Piece Goods Export Associations as the highest organ for the control of the export trade of cotton goods. While the proposed association will function as a central organ in the matter of trade control, the existent associations set up by production groups, i.e., those for the export of yarns, dyed clothing, striped drills, will be charged, as transitional organs, with the control of their respective groups of products. It seems probable also that the export associations for the exporting localities of Tokyo, Nagoya, Osaka, Kyoto, Yokohama, and Kobe will extend their control to new markets above mentioned. Mention may also be made of the proposal advanced by the association to the effect that upon the establishment of an allied association, a control fee should be charged at the rate of one-tenth of a sen on every yard of clothing exported, the nine parts of the same fee being applied to the fund for indemnification of wool imports and other purposes of trade control, and the remaining one-tenth of the fee being used for the running expenses of the association. These points are evidently to be taken up for decision when the official and private representatives meet next time. After the above consideration, it must be mentioned that, since the matter of rigidly controlling exports relates not only to the export associations but also to those engaged in production, it will be necessary as a fundamental measure to place the whole cotton industry under one unified system of control so that import, export and production may be directed by a single hand in the State. The Department of Commerce and Industry, therefore, in framing the new trade control law seems practically to have come to a decision to make the measure comprehensive enough to consolidate the whole cotton industry.

The main objectives of the law of foreign trade control under contemplation are to intensify the control of the State over the export trade in cotton goods by means of revision of the existing law of export association, and also at the same time to place the export and import trade under unified control by the legislation of an import Association law as a system to meet the situation arising from barter arrangements either in existence or in view. Upon the enactment of the same legislative measure it is inevitable that the people engaged in export and import will find themselves in a position so greatly strengthened by legislation as to dictate terms to the manufacturers. Under these circumstances, there is already in sight a disparity of opinion between the export associations and the manufacturing cartels. It may be seen, for instance, that the Trade Association for the export of Cotton Yarn and Piece Goods, issuing its manifesto on the subject of intensification of export association, objects to the participation of manufacturers in the export associations from the point of view of an intensified State control of the export trade, and proposes that the application of the law of export association should be extended to colonial territories. The Japan Association of Cotton Manufacturers for one, which is a manufacturers' cartel, takes strong exception to this idea of con-

solidating the associations existing under legislation. As a matter of fact, this cotton manufacturers' association has always taken a position opposed to the export associations on the matter of allotment of export quotas. The exporters' group has always insisted on the existing system under which 70 to 80 per cent. of the exports are preferentially allotted on the basis of past records, and even the remaining 20 to 30 per cent. are offered by tender under arrangements more favourable to those already in trade, the idea being to shut new exporters out of the field. The manufacturers' association, on the other hand, has been proposing that the preferential quota for the exporters should be reduced to 50 per cent. Under the contemplated system of export association, not only greater pressure will be applied on the manufacturers but the import associations to be formed by legislation, as in the case of the export associations, will be legally given controlling powers, with the result that the member-importers (who are at the same time exporters) will be in a position to dictate terms to the manufacturers through the import of raw cotton. Such being the case, the cotton manufacturers have not without reason given expression to their objection to the envisaged legislation.

To make the situation more complicated, the manufacturers do not show a united front. The Japan Association of Cotton Textile Manufacturing Guilds, which is a legal organization similar to the export associations, takes a position against the Cotton Manufacturers' Association, joining issue with the exporters. There is a twofold reason for their combination. In the first place, the textile guilds are in the same position as the exporters with regard to the Cotton Manufacturers' Association. As the exporters, in dealing with the question of settling the quotas of cotton piece goods exports to the Netherlands East Indies, had difficulty with the manufacturers' association, which demanded a share of 50 per cent for itself against as many per cent. for the exporters, so that the Textile Guilds found their position endangered when the Cotton Manufacturers' Association recently put forward its demand for a new association of cotton textile makers, and more recently proposed that the examination system of cotton goods for export should be placed under State management. In the second place, the exporters will have a greater advantage in presenting

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one front with the guild people against the Cotton Manufacturers' Association in paving the way for the legislation of trade control along the proposed lines. The guild people for their part, by combining with the exporters, will be in a stronger position to demand national control of the production of cotton textiles concurrent with the State control of the export of cotton products.

The conclusion is that, while a unified control of the foreign trade of cotton goods by legislation is urgently required as regards foreign countries, the application of the existing law in a modified and intensified form would, from the internal point of view, inevitably accentuate the conflicting interests of the Cotton Manufacturers' Association and the group of Cotton Guilds and Exporters' Associations. It is very probable, therefore, that the Government, considering the question as it should from a broad and national point of view, will so frame its trade control measure as to recognize the interests of the Manufacturers' Association in one form or another. In any event, it is a fact that not a few companies operating both spinning and weaving mills have already joined issue with the Association of Textile Guilds as far as the matter of State examination of cotton goods is concerned. Nor is it impossible that these yarn and textile companies may secure the export and import right by establishing a capitalistic control over the exporters who hold the quotas for export and import trade. Therefore, whatever sort of legislation may be enacted, it is to be expected that the consolidation of the cotton industry will continue and extend under the inexorable control of large capital through reorganization of systems, changes in capital structures, and through various other processes.

JAPAN.

According to a report issued recently by the U.S. Department of Commerce, August production of cotton yarn by members of the Japan Cotton Spinners' Association was reported as 292,000 bales (of 400 lbs.), a decline of 3,000 compared with the July output. For the eight months ended August the cumulative total approximated 2,375,000 bales, compared with 2,387,000 in January-August, 1935. The August decline was attributed to voluntary limitation of output. One of the most important recent developments in the Japanese cotton spinning industry has been the more effective control over production facilities as a result of independent mills joining the Japan Cotton Spinners' Association. Membership in the Association at the end of June was reported as 70 companies, against only 60 in April, giving the Association practically complete control over productive facilities with only two small concerns now operating independently. At the end of June, the 70 member companies had 10,687,860 spindles in place, an increase of 970,536 compared with the Association's reported installations on the corresponding date of 1935, but of only 391,332 compared with the total in place on December 31, 1935. A substantial percentage

of this increase may be attributable to new mills joining the Association.

A large number of cotton-spinning mills are reported to be diverting their spindles to staple fibre. Unconfirmed reports stated that 170,000 spindles were converted for this purpose during the first half of 1936, and that an additional 200,000 will be converted during the remainder of the year. It is reported, furthermore, that companies are scrapping their plans for new installations of cotton spindles and replacing these with plans for the production of staple fibre. It is certain that production of staple fibre is expanding very rapidly, but it is very difficult to secure accurate reports of production. Trade estimates placed productive capacity at the end of July at approximately 78½ metric tons per day.

The increase in spindlage in cotton mills is expected to be much less rapid in the future, owing to this diversion of spindles to staple fibre, increased restrictions on new installations, and the scrapping of obsolete equipment. In fact, it is possible that the increase during the second half of this year may not exceed 100,000 spindles. Another factor militating against increases in Japan proper is the pronounced tendency toward the installation of new equipment in the Japanese-owned mills in Chosen, Manchuria, and China.

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COTTON TRADE STATISTICS

INDIA.

Imports of cotton yarns and piece goods into India during the three months April 1, 1936, to June 30, 1936. (Prepared by His Majesty's Senior Trade Commissioner in India and published by the Department of Overseas Trade):—

Cotton Yarns.—The total imports rose from 8,089,748 lbs. to 9,084,895 lbs., but the values declined from Rs.82 lakhs to Rs.75 lakhs. The share of the United Kingdom fell from 2,492,262 lbs. to 2,488,907 lbs., and the values from Rs.26 lakhs to Rs.24 lakhs. Arrivals from Japan increased in quantity from 5,078,945 lbs. to 5,290,514 lbs., but fell in value from Rs.46 lakhs to Rs.41 lakhs. Imports from China fell from 1,398,587 lbs (Rs.10 lakhs) to 1,296,400 lbs. (Rs.9½ lakhs).

Grey Piece Goods (plain grey).—The total imports dropped from 59,646,441 yards (Rs.71 lakhs) to 51,455,292 yards (Rs. 61 lakhs). Arrivals from the United Kingdom fell heavily from 7,101,252 yards (Rs.8½ lakhs) to 3,678,117 yards (Rs.5 lakhs). Imports from Japan also dropped from 52,339,598 yards (Rs.62 lakhs) to 47,719,437 yards (Rs.55½ lakhs).

Grey Piece Goods (bordered greys).—The total volume of imports rose from 29,292,425 yards (Rs.40½ lakhs) to 32,558,076 yards (Rs.44¾ lakhs). This increase was more than secured by imports from Japan, which rose from 13,533,110 yards (Rs.15 lakhs) to 19,418,340 yards (Rs.22¼ lakhs). On the other hand, arrivals from the United Kingdom fell from 15,759,315 yards (Rs.25½ lakhs) to 13,135,736 yards (Rs.22½ lakhs). The share of "other countries" was negligible.

White Piece Goods (bleached).—The aggregate imports fell sharply from 80,201,442 yards (Rs.1,45½ lakhs) to 60,520,175 yards (Rs.1,18½ lakhs). Imports from Lancashire slumped from 60,397,873 yards (Rs.1,13 lakhs) to 43,234,150 yards (Rs.88 lakhs), while those from Japan fell slightly from 18,410,665 yards (Rs.26 lakhs) to 15,135,672 yards (Rs.22 lakhs). Imports from Switzerland advanced considerably from 663,229 yards (Rs.3 lakhs) to 1,499,704 yards (Rs. 6 lakhs), and those from the Netherlands also rose from 409,931 yards (Rs.1 lakh) to 511,332 yards (Rs.1½ lakhs).

Printed Piece Goods.—The total imports fell from 58,731,423

yards (Rs.89 lakhs) to 48,734,094 yards (Rs.74 lakhs). Here again the major loss was borne by the United Kingdom, whose imports fell from 20,678,325 yards (Rs.45 lakhs) to 12,887,503 yards (Rs. 28½ lakhs). Imports from Japan receded from 38,012,762 yards to 35,839,520 yards, but the values rose slightly from Rs.44½ lakhs to Rs.45½ lakhs.

Dyed Piece Goods.—The aggregate trade fell from 30,842,638 yards (Rs.71 lakhs) to 22,415,523 yards (Rs.55½ lakhs). Imports from the United Kingdom dropped from 24,387,738 yards (Rs.61 lakhs) to 18,280,603 yards (Rs.47½ lakhs). Imports from Japan also fell from 5,508,722 yards (Rs.7½ lakhs) to 3,134,741 yards (Rs.5 lakhs). By contrast, arrivals from Switzerland rose from 535,018 yards (Rs. 2 lakhs) to 748,031 yards (Rs.2½ lakhs).

Woven Coloured Piece Goods.—Here again there has been a shrinkage in the total trade from 7,721,208 yards (Rs.17 lakhs) to 3,235,520 yards (Rs.7½ lakhs). The United Kingdom share fell from 2,489,236 yards (Rs.7 lakhs) to 639,877 yards (Rs.2½ lakhs), while that of Japan dropped from 5,128,916 yards (Rs.9½ lakhs) to 2,525,305 yards (Rs.5 lakhs).

Fents.—The total trade rose from Rs.16½ lakhs to Rs.17 lakhs in value. Imports from the United Kingdom were steady at Rs.2 lakhs. Arrivals from Japan rose from Rs.13 lakhs to Rs.14½ lakhs, while those from the U.S.A. fell from Rs.1 lakh to Rs.½ lakh.

Cotton Sewing Thread.—The total imports advanced from 407,722 lbs. valued at Rs.10½ lakhs to 462,788 lbs. valued at Rs.11½ lakhs. Imports from the United Kingdom rose from 290,888 lbs.(Rs.8 lakhs) to 344,504 lbs. (Rs.9½ lakhs) while those from "other countries" increased from 116,834 lbs. (Rs.2½ lakhs) to 118,284 lbs. (Rs.2½ lakhs).

PRODUCTION OF COTTON YARN AND PIECE GOODS IN JAPAN.

Year and Month	Cotton Yarn† bales	Cotton textile*		Silk-Cotton Mixed Textiles*		Cotton‡ Piece goods 1,000 sq. yds.	Mushin* metres
		Broad Width metres	Narrow Width pieces	Broad Width metres	Narrow Width pieces		
1934 . . .	3,472,442	3,689,072,817	110,016,164	3,916,253	857,141	1,793,845	95,351,763
1935 . . .	3,560,724	3,811,718,463	113,034,685	4,278,844	1,866,844	1,843,469	107,779,419
1935 May . .	302,980	344,971,084	10,755,469	309,222	180,424	156,203	9,702,974
June . . .	304,499	336,826,777	9,844,501	360,028	183,928	156,839	9,978,474
July . . .	283,076	314,246,115	9,781,954	390,328	116,054	147,911	9,417,457
Aug. . . .	282,158	302,866,410	8,791,561	337,422	110,673	146,886	8,664,985
Sept. . . .	289,270	310,975,091	10,087,569	470,990	194,520	150,732	8,237,451
Oct. . . .	292,640	303,292,065	9,922,317	317,444	200,736	148,471	8,127,377
Nov. . . .	295,974	310,062,894	9,881,556	393,968	218,617	152,937	7,634,080
Dec. . . .	295,173	292,873,517	9,383,930	295,952	196,176	152,956	9,042,674
1936 Jan. . .	281,566	275,714,091	8,039,143	202,994	178,565	143,326	7,519,384
Feb. . . .	295,402	278,469,742	8,575,927	251,432	93,102	149,556	8,483,015
March . . .	298,819	288,517,101	11,044,545	249,362	119,252	148,985	8,552,542
April . . .	303,851	279,318,742	10,904,496	280,214	187,789	153,169	8,535,735
May . . .	303,969	295,013,135	10,913,505	335,294	171,520	152,694	7,945,635
June . . .	308,524	311,778,064	10,205,265	549,842	137,760	155,258	8,355,960
Jan. to June 1936	1,787,129	1,744,535,446	59,691,881	1,968,838	853,606	902,987	49,342,271
June 1935	1,821,025	1,976,808,674	65,185,798	2,018,740	767,557	943,676	56,655,395

Source : * Department of Commerce and Industry, Tokyo. † Spinners' Association. ‡ Spinners' Association.

EXPORTS AND IMPORTS OF RAW COTTON.

During the Seasons 1934-35 and 1935-36.

In thousand Centals (1 cental=100 lbs.)

(Compiled by the International Institute of Agriculture).

Countries		Twelve Months (August 1-July, 31)			
		Exports		Imports	
Exporting Countries :		1935-36	1934-35	1935-36	1934-35
United States .. ..	..	32,611	26,511	791	536
Argentina .. ..	..	1,030	694	—	—
Brazil .. ..	..	†2,822	†3,285	—	—
India .. ..	..	14,961	12,553	1,285	1,841
Egypt .. ..	..	†7,663	†7,507	—	—
Importing Countries :					
Germany .. ..	..	573	966	7,264	6,391
Austria .. ..	..	—	4	886	672
Belgium .. ..	..	602	710	2,194	2,070
Denmark .. ..	..	—	—	176	185
Spain .. ..	..	†33	†49	†2,077	†1,991
Estonia .. ..	..	—	—	119	117
Finland .. ..	..	—	4	280	287
France .. ..	..	335	617	7,081	4,941
Gt. Britain and N. Ireland ..	..	747	710	15,168	11,250
Greece .. ..	..	11	11	110	165
Hungary .. ..	..	—	—	560	489
Italy .. ..	..	—	—	—	—
Latvia .. ..	..	—	—	97	108
Norway .. ..	..	—	—	71	64
Netherlands .. ..	..	4	4	1,001	847
Poland .. ..	..	4	9	1,614	1,437
Portugal .. ..	..	—	—	560	450
Sweden .. ..	..	—	—	672	624
Switzerland .. ..	..	—	2	549	564
Czecho-Slovakia .. ..	..	49	73	2,130	1,554
Yugo Slavia .. ..	..	—	—	375	320
Canada .. ..	..	—	—	1,358	1,241
China .. ..	..	†860	†368	†875	†1,550
Japan .. ..	..	*456	*545	*14,659	*14,795
Algeria .. ..	..	—	4	4	4
Totals .. ..	..	62,761	54,626	61,956	54,493

* Data up to May 31.

† Data up to June 30.

U.S.S.R.

According to Soviet statistics cotton imports into Russia in 1935 amounted to 44,220 metric tons, compared with 24,875 tons in the preceding year. There were no exports of Soviet cotton during 1935, as against a total of 7,000 tons during 1934.

MISCELLANEOUS

COTTON BAGS FOR SUGAR.

According to a recent issue of the *American Wool and Cotton Reporter*, a cotton bag to be used as packing for raw sugar has been designed by technologists of the U.S. Bureau of Agricultural Economics, in co-operation with North Carolina State College. The bag is to be put through a series of practical tests in transporting raw sugar from Hawaii to refineries in California, in comparison with sugar bags made of jute. All jute used in America is imported—chiefly from India. Cotton bags cost more than jute, but Bureau officials believe that this disparity in cost may be overcome by developing a cotton fabric that can be re-used three or more times. Laboratory tests have demonstrated that the new cotton bag is much more durable than sugar bags made of jute. The cotton bag will be cheaper than jute if it can be used three times, since usually jute bags are used only once. Officials estimate that if cotton can displace the jute bagging commonly used in packing Hawaiian raw sugar, it will provide an outlet for 10,000 bales of cotton a year. If all imports of raw sugar were packed in cotton bags the consumption of cotton would be increased by about 50,000 bales a year.

THE USE OF COTTON IN THE MOTOR CAR INDUSTRY.

According to Mr. Henry Ford, of the Ford Motor Co., every million cars manufactured by his company entails the use of 60 million pounds of raw cotton for the making of upholstery, tyres, brake linings, timing gears and cellulose for safety glass.

The United States motor car industry consumes 487,000 bales of cotton per annum, or 9.1 per cent. of the total United States mill takings.

30,000,000 yards of cotton cloth are required annually for upholstery in motor cars.

STABILISING U.S. TEXTILES.

For several months United States cotton textile mills have enjoyed a high and increasing rate of activity, and a fresh spurt in buying has taken place during the last week or two. Leading men in the trade, however, are not letting this phase obscure the fact that capacity and organization require substantial adjustments in

order to safeguard future prosperity, and a strong plea for positive action before it is too late was made recently by Dr. C. T. Murchison, President of the Cotton Textile Institute.

Dr. Murchison put forward his proposals at the annual banquet at Boston on October 6 of the National Association of Cotton Manufacturers, where they provoked much discussion. He said he believed that the industry could establish a stabilization corporation which would have the support of mill companies and selling houses alike and whose business activities would not be competitive, but designed to support the market and provide it with a steadying hand in appropriate places and at strategic times. It might also co-operate in the private efforts now being made to hasten the immobilization of obsolete machinery by final liquidation and by holding in check the operation of marginal machinery through the use of the leasing system which, Dr. Murchison pointed out, had been expressly recommended for further use by the Cabinet committee in its report on the textile industry.

(Manchester Guardian Commercial.)

Alterations in the Supply of Raw Materials for the German Textile Industry.

The following is extracted from a recent issue of the *Hamburg World Economic Archives*:—

Amongst the effects of the New Plan the alterations in the supply of raw materials for the textile industry play a particularly remarkable rôle. In this department it was at first believed, both by those engaged in foreign trade and by experts in manufacturing technique, that a change-over could be carried out only with difficulty and comparatively slowly.

Quite naturally the main interest centred around the question of cotton. It had become the custom for Germany's supplies of cotton to be obtained for the greater part from the United States.

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But this was just where the effects of the New Plan must necessarily set in, as with no other country was the trade balance so strikingly lacking in proportion of imports to exports, and this unfavourable balance, both quantitative and *ad valorem*, was due mainly to the cotton imports from the United States. Of the 236.9 million excess of imports from the United States in the year 1933 not less than 223.14 million was due to the cotton imports. The operation of the New Plan caused the import from the United States to sink in 1935 quantitatively to half of what it was in 1934, although Germany's total supplies remained almost exactly constant. The development is still more strongly marked when we consider the share of the United States of the total *ad valorem* cotton imports of Germany. It fell from 72.69 per cent. in 1933 to 56.14 per cent. in 1934 and to 21.57 per cent. last year. Thus the preponderance of the United States has been destroyed: the change-over finds expression in the rapid increase of the share of other countries (Brazil from .01 per cent. to 27.93 per cent., Peru from 2.51 per cent. to 7.85 per cent., Turkey from .15 per cent. to 4.7 per cent., Argentina from 1.29 per cent. to 4.16 per cent., etc.).

Germany's textile trade balance still shows a great excess of imports, which in the year 1935 was even increased by a further 49 millions. It is therefore clear that efforts must be made to reduce this difference from both sides, i.e., both by increasing home production of raw materials and by the promotion of exports.

The extremely rapid decline in Germany's exports of textile goods during the previous years came fairly well to a standstill in the year 1935, and in the first few months of 1936 had given way to a great improvement. Already in the year 1935 the export of textile goods could be increased to quite a number of countries (British West Africa, Chile, Great Britain, Mexico, Peru, and Turkey).

In this way the importance of Great Britain as a customer has increased still further; with an export value of nearly 54 million Reichsmarks she occupies second place behind Holland, which heads the list with 66.8 millions. Unfortunately, however, in the year 1935 Germany's textile quota in Holland was not exploited to the full. Germany has always been one of the chief providers of Holland, especially as regards clothing. An increase of the turnover is so much the more possible as Japan, the cheapest competitor, is practically not represented in Holland, since the object of the quota system was to protect the home industry from Japanese competition. Competition in Holland is rendered difficult, however, by England, who has been able to strengthen her position considerably on account of the advantage of her currency.

The other chief customers of the German textile industry, too, continue to be in Europe (Sweden with 37.9 millions, Switzerland with 31.4 millions, Denmark with 21 millions, etc.). Opposed to the excess of exports reached for some of these countries there is the heavy excess of imports from the raw material countries, among which Brazil occupies first place with a passive balance of 96 millions. Just this development of the figures for Brazil accounts for the fact that during the past few months the imports in cotton have again been taken on a somewhat larger scale from the United States.

This return to the United States for our cotton imports, however, depends also in some measure on the problem that arose through the very quick change-over of chief providers in the textile trade which was mentioned at the commencement of this article. For the maintenance and promotion of textile exports compels Germany to make sure that the quality of her exports is kept up. Though inferior qualities may at times be used for supplying the home market because of the scarcity of international competition, for the export article the usual product must be delivered from the usual raw material; the greater part of the existing supplies from the United States has therefore been employed in the year 1935 for export purposes.

SYNDICATION IN CZECHO-SLOVAKIA.

There was passed in July last in Czecho-Slovakia an Act dealing with the so-called "compulsory syndication" in the textile industry. These Government Regulations do not apply only to cotton; they refer to the whole of the textile industry. This Act, therefore can be used by the jute weaving mills or silk stocking factories as well. The chief principles of this Act are as follows:—

If the industrial associations obtain a majority of at least 75 per cent. they can carry out their activity compulsorily for the whole 100 per cent. of the syndicated branch under the supervision of the Government. The remaining minority becomes automatically a member of the syndicated part and is compelled to fall in with the regulations of the majority.

A majority of 75 per cent is judged either by the capacity, total number of workmen, or by the turnover in a certain period, according to the decision of the association applying for the syndication. In order to avoid disagreements with regard to the minority, the Act provides a State supervision by a special commissary of the Ministry of Commerce.

Another important feature of the Act is a facultative "numerus clausus." In that branch of industry, which demands the syndication, new mills can be erected only if the organization in question (provided that the said organization obtained a majority of at least 75 per cent. and has been approved by the Ministry) gives a special licence. A similar approval has to be obtained in that case when the old mills, which have been closed down for more than 18 months prior to July, 1936, want to resume work.

Up to now, two or three organizations, including the cotton spinners, have demanded the syndication of their industry. The cotton spinners applied for the syndication only with the intention of enforcing an absolute and compulsory observance of the conditions of payment and of sale, whereas a quota cartel is being prepared on the grounds of a voluntary understanding, i.e., without the aid of this Act.

What the further development of this question will be is difficult to say at present.

Reviews on Current Cotton Literature.

"INTERNATIONAL YEAR-BOOK OF AGRICULTURAL STATISTICS (1934-1935)." Published by the International Institute of Agriculture, Rome.

An invaluable publication, wherein is to be found practically every known translation relating to production of every agricultural commodity. The book reflects the vast amount of work which the Institute undertakes each year. Details are given relating to the world's population and area; apportionment of areas; agricultural production and live stock in the various countries; area and production of various crops; commodity prices; imports and exports of various commodities in respect of all countries, etc.

"ANNUAL COTTON HANDBOOK," 1936 (66th Edition. Published by Comtelburo Ltd. Price 5s. 2d. post free).

The various annual editions of this extremely useful cotton statistical reference book occupy a prominent place upon the shelves of the library of the International Cotton Federation. Scarcely a day passes without our having to make reference to one or another of the valuable tables contained therein. As usual, comprehensive cotton statistics dealing with American, East Indian, Egyptian, Brazilian, and other growths of cotton are included.

A new feature of the 1936 edition is the addition of tables showing the imports of Indian cotton into Liverpool and Manchester, together with spinners' takings and stocks, these being given for the season 1935 and 1936, with comparisons for 1934-35. A table is also provided showing the highest and lowest futures prices for "American and other Growth," trading in this contract commencing on January 2, 1936.

"INDUSTRIAL FIBRES." Printed and published for the Imperial Economic Committee by H.M. Stationery Office. Price 2s. 6d., post free.

An exceptionally well-compiled publication containing a comprehensive summary of figures of production, trade and consumption relating to cotton, wool, silk, flax, jute, hemp and rayon.

As far as cotton is concerned, tables are given showing the area under cotton in the British Empire and in other cotton-growing countries during the past few years; cotton production, varieties, exports and imports and their distribution, cotton mill consumption in the various countries, and cotton prices.

A publication commemorating the CENTENARY of the Austrian firm of F. M. HÄMMERLE & CO., spinners and coloured weavers, of Dornbirn, has recently been forwarded to this office. The firm are to be congratulated upon the production of so handsome a book, which contains over 150 pages portraying the history of the Hämmerle family and the various stages of the development of the firm from its foundation in 1836. The book, which is printed in the German language, is amply illustrated with many excellent sketches and photographs of the firm's mills as they were in the

earlier stages of their existence, and as they are to-day. The wonderful natural setting amongst which the mills are situated does much to enhance the beauty of the illustrations. Other photographs show the various stages in the manufacturing processes in the spinning and weaving mills connected with the firm.

“DAVISON'S TEXTILE BLUE BOOK, 1936 (UNITED STATES, CANADA AND MEXICO).” Published by the Davison Publishing Co., 50, Union Square, New York.

The seventy-first annual edition of this extremely useful year book has recently come to hand. Prominent features of interest are arranged by States, showing the number of spindles, looms, cards and combs in the various mills of the above-mentioned countries; textile associations; an index to raw cotton merchants; cotton warehouses, textile mill suppliers; maps, revised to date, showing towns where there are textile plants, dyeing, bleaching or finishing works.

Prices: Office edition, \$7.50; Handy edition, \$5.00; Salesmen's Directory, \$4.00. Foreign, 50 cents extra.

The current issue of the “EMPIRE COTTON-GROWING REVIEW” (October, 1936), contains many articles of interest, prominent amongst which are the following:—

“The Development of Cotton Cultivation in Sind, under the Lloyd Barrage and Canal Systems,” by W. J. Jenkins.

“The Early Development of the Cotton Fibre,” by F. M. L. Sheffield.

“The Effect of Leaf-curl Disease on the Yield of the Cotton Plant,” by F. W. Andrews.

Published by P. S. King & Son Ltd., 14, Great Smith Street, London, S.W.1, for the Empire Cotton-growing Corporation. Price 1s. quarterly; annual subscription, 5s., post free.

“BIBLIOGRAPHY OF TROPICAL AGRICULTURE, 1935.” Published by the International Institute of Agriculture, Rome.

The fifth volume of the “Bibliography of Tropical Agriculture” has followed the same principle as those of the preceding numbers. It has, however, been deemed necessary to number the items of each chapter so as to be able to add reference notes where quotations have been made from articles which discuss various subjects or are difficult to place in a fixed category.

BOOKS RECEIVED.

“REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN SYRIA AND LEBANON” (June, 1936). By G. T. Howard, C.M.G.,

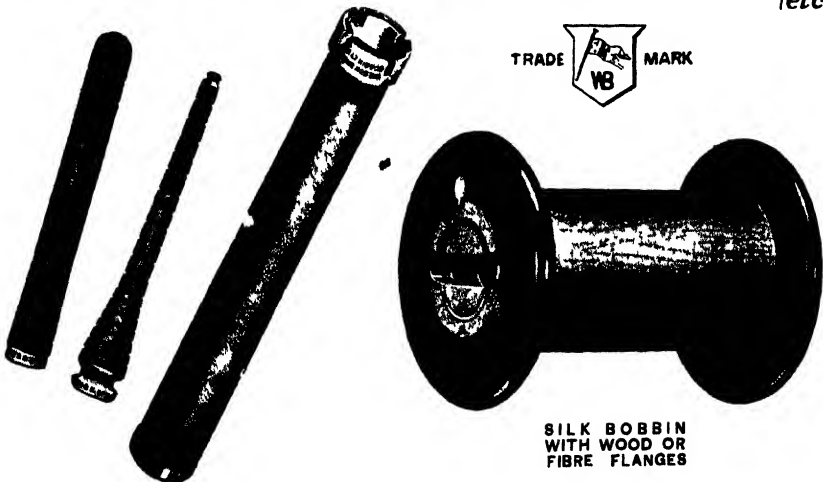
H.M. Consul-General, Beirut. Printed and published for the Department of Overseas Trade by H.M. Stationery Office. Price 9d. net.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN NEW ZEALAND" (April, 1936). By H.M. Trade Commissioner and Assistant Trade Commissioner in New Zealand. Printed and published for the Department of Overseas Trade by H.M. Stationery Office. Price 2s. net.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN POLAND." By the Commercial Secretary to H.M. Embassy at Warsaw (March, 1936). Published by the Department of Overseas Trade. Price 1s. net.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN CHILE" (May, 1936). By the Commercial Secretary to H.M. Embassy, Santiago. Printed and published for the Department of Overseas Trade by H.M. Stationery Office. Price 1s. 6d. net.

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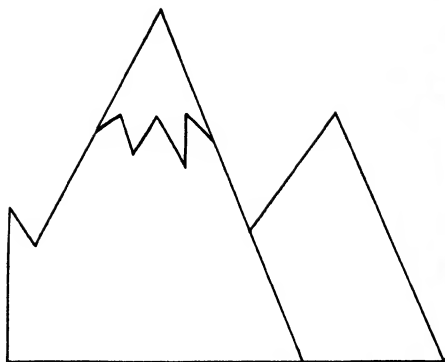


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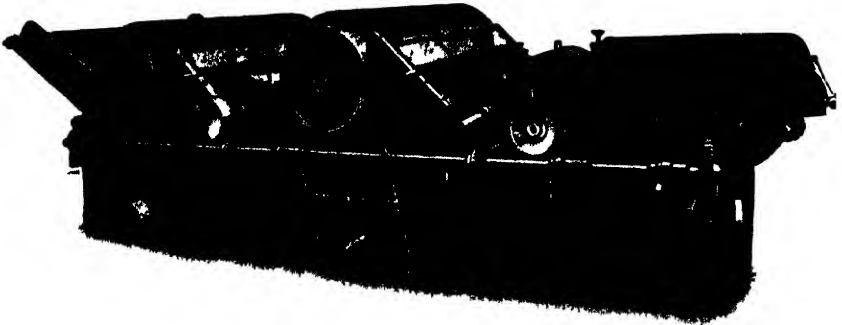
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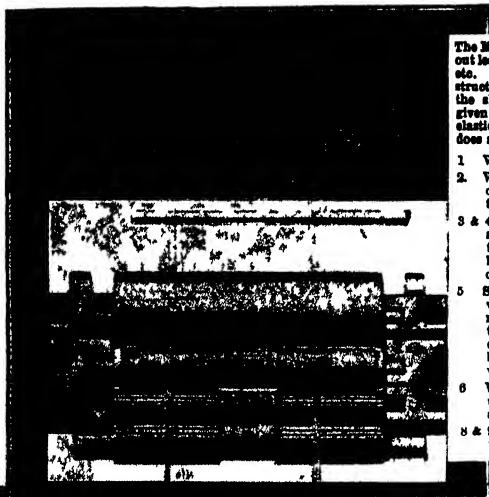
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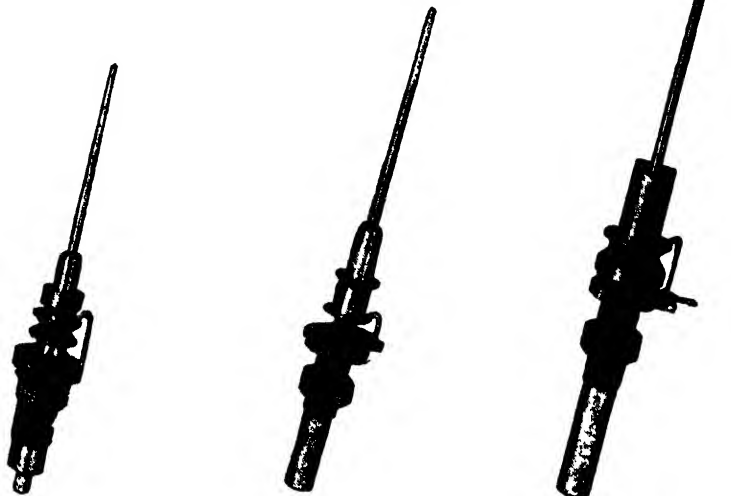
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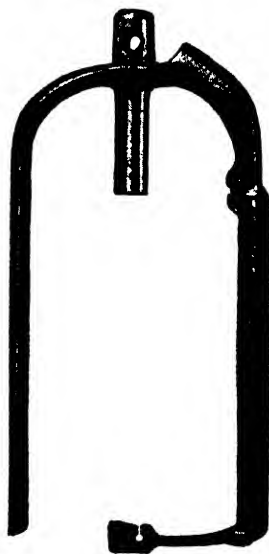
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COMMITTEE'S COMMUNICATIONS.

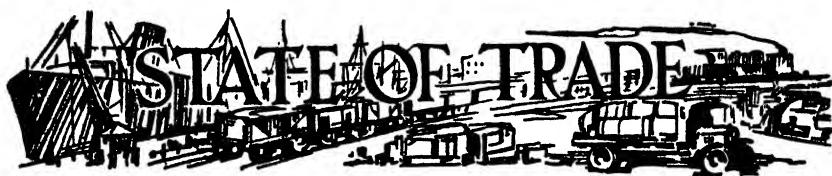
We understand that the Egyptian Sub-Committee in charge of the arrangements for the holding of the International Cotton Congress in Cairo in December next is busily engaged in its task. Further announcements will be made in this connection in the next issue of the INTERNATIONAL COTTON BULLETIN in April. In the meantime, affiliated Associations are desired to bring before their members the necessity of preparing papers for discussion at the Congress; the papers should deal with any subject appertaining to cotton or the cotton trade.

We are desired by Mr. F. Taylor of the United States Department of Agriculture, to thank the many firms both in Great Britain and on the Continent, who have sent examples of false-packed or otherwise unmerchantable cotton, in order to substantiate the many complaints made by the Federation. All the evidence supplied to Mr. Taylor will be taken to Washington and submitted to the Department of Agriculture by Mr. Taylor, when he returns to present his report.

He is again in England, following a tour of Continental mills, and any spinners having further complaints of false-packed American cotton are urged to communicate with the Head Office of the International Federation, when Mr. Taylor's attention will immediately be drawn to the matter, and if possible, arrangements will be made for Mr. Taylor to visit the mill and investigate the complaint.

The attention of readers is drawn to the result of our Cotton Bale Enquiry, published on pages 213-228.

This has been undertaken in response to enquiries which we have been constantly receiving concerning bale weights, methods of covering and banding, etc. To the best of our knowledge, nothing quite so extensive has ever been issued. We trust that it will supply a long-felt want.



AUSTRIA.

SPINNING SECTION.

The activity of the cotton-spinning industry during October and November has improved considerably in comparison with the previous months. This is especially attributable to the increase of exports, chiefly to Roumania. During the last few weeks a critical situation has arisen in connection with the Roumanian export situation in consequence of the breakdown of the Conferences in regard to a new Clearing House and Trade Agreement. It should therefore be realized that our yarn exports will be influenced by a severe reduction, which will severely affect the business conditions of our spinning mills.

According to the trade statistics the imports of cotton yarns in the first ten months of 1936, as compared with a similar period in the previous year, were as follows:—

				IMPORTS	
				1936	1935
				Quintals	Quintals
Grey yarns	..	..	..	13,872	against 11,057
Bleached yarns	..	..	..	2,349	„ 2,136
Dyed yarns	..	..	..	2,066	„ 1,453
Total	..	..	..	<u>18,287</u>	<u>14,646</u>

From the above it will be seen that imports increased by 3,641 quintals, or approximately 25 per cent.

In comparison with the above import figures, exports are shown in the following table:—

				EXPORTS	
				1936	1935
				Quintals	Quintals
Grey yarns	..	..	..	100,947	against 74,432
Bleached yarns	..	..	..	2,460	„ 2,466
Dyed yarns	..	..	..	688	„ 780
Total	..	..	..	<u>104,095</u>	<u>77,678</u>

The increase shown is 26,417 quintals, or 34 per cent.

WEAVING SECTION.

According to the latest weaving statistics the working of double shift showed a considerable reduction, whereas the working of single shift did not show any important alteration. The number of

idle looms was slightly raised. In spite of improved business conditions the economic conditions of the industry have been held back, because prices showed a downward tendency as a result of keen competition. So far it has not been possible to arrive at an agreement in regard to the regulation of production, and an improvement in the situation is therefore not expected. The increase in exports of cotton goods during the first ten months is shown by the following tabulation:—

				1936		1935
				Quintals		Quintals
Grey	..	..	..	15,038	against	11,239
Bleached	..	..	..	1,204	"	1,532
Dyed	..	..	..	1,006	"	1,308
Printed	..	..	..	827	"	965
Coloured woven	..	..	..	1,517	"	2,009
Total	..	..	..	<u>19,592</u>	"	<u>17,053</u>

This shows an increase of 2,539 quintals, or about 15 per cent.

Wages have not been altered during the last few months, neither in the spinning section nor in the weaving section.

The outlook for the future of business conditions cannot be expressed as hopeful, as the export position for the cotton-spinning mills has not improved, while the weaving section, which caters almost exclusively for the home market, cannot expect an increase in the weaving margins in the near future.

The following is the original report in German:—

BAUMWOLLSPINNEREI.

Die Beschäftigung der Baumwollspinnereien hat sich in den Monaten Oktober und November gegenüber den beiden vorausgegangenen Monaten gebessert, was hauptsächlich auf das Wiederansteigen des Exportes, namentlich nach Rumänien, zurückzuführen ist. In den letzten Wochen hat sich allerdings eine kritische Wendung in der Vertragslage gegenüber Rumänien ergeben, da die Verhandlungen über ein neues Zahlungs- und Handelsübereinkommen zunächst unterbrochen wurden. Es ist also damit zu rechnen, dass unsere Garnsausfuhr zunächst eine nicht unerhebliche Herabminderung erfahren wird, was sich auf die Beschäftigungsverhältnisse der Spinnereibetriebe ungünstig auswirken muss.

Nach der Handelsstatistik hat sich die Einfuhr von Baumgollgarnen in den ersten zehn Monaten des Jahres 1936 im Vergleich zur gleichen Periode des Vorjahres wie folgt gestaltet:—

				EINFUHR		
				1936		1935
				in q	gegen	in q
rohe Garne	..	..	..	13,872		11,057
gebleichte Garne	..	..	..	2,349	"	2,136
gefärbte Garne	..	..	..	2,066	"	1,453
zusammen	..	..	..	<u>18,287</u>	"	<u>14,646</u>

Es hat sohin eine Importsteigerung um 3,641 q. oder 25 % stattgefunden. Demgegenüber zeigt die Entwicklung der Ausfuhr folgendes Bild:—

AUSFUHR

				1936		1935
				in q		in q
rohe Garne	..	..	..	100,947	gegen	74,432
gebleichte Garne	..	..	..	2,460	„	2,466
gefärbte Garne	..	..	..	688	„	780
zusammen	..	..	..	<u>104,095</u>	„	<u>77,678</u>

Die Steigerung betrug sohin 26,417 q. oder 34 %.

BAUMWOLLWEBEREI.

Nach der letzten Webstuhlstatistik wurde der Umfang der Zwischichtarbeit in verhältnismässig geringfügigem Ausmasse abgebaut, während der Umfang der Einsichtarbeit keine nennenswerte Aenderung erfuhr. Die Zahl der stillliegenden Stühle hat sich in verhältnismässig kleinen Ausmasse erhöht. Ungeachtet der befriedigenden Beschäftigungslage haben sich die wirtschaftlichen Verhältnisse der Industrie neuerding verschlechtert, weil die Preise infolge des immer schärfer werdenden Konkurrenzkampfes eine weitere Abwärtsbewegung aufwiesen. Sofern es nicht gelingen sollte in kürzester Zeit zu einem Abschluss der Verhandlungen über die Regelung der Produktions- und Absatzverhältnisse zu gelangen, ist mit einer neuerlichen Verschärfung der Situation zu rechnen. Die Entwicklung der Einfuhr in Baumwollgeweben während der ersten zehn Monate zeigt das folgende Bild:—

EINFUHR

					1936		1935
					in q		in q
roh ..	..	..	..	..	15,038	gegen	11,239
gebleicht	..	..	..	..	1,204	„	1,532
gefärbt	..	..	..	..	1,006	„	1,308
bedruckt	..	..	..	..	827	„	965
buntgewebt	..	..	..	..	1,517	„	2,009
zusammen	..	..	..	..	<u>19,592</u>	„	<u>17,053</u>

Dahen Mehreinfuhr 2,539 q. oder rund 15 %.

Die Lohnverhältnisse haben sich während der letzten Monate weder in der Spinnerei, noch in der Weberei geändert.

Die Aussichten hinsichtlich der Geschäftsgestaltung für die nächste Zukunft sind nicht günstig zu beurteilen, da sich für die Spinnerei, die fast ausschliesslich für den Binnenmarkt arbeitet, mit einer Steigerung der unzulänglich gewordenen Webmargen vorerst nicht gerechnet werden kann.

(Verein der Baumwollspinner und Weber Oesterreichs).

BELGIUM.

The last few months of 1936 were remarkable for the increased activity in the Belgian cotton industry.

Cotton spinners' order books are well filled and stocks of yarn which had increased are being gradually absorbed.

This situation is having its influence on prices, although they are not what one would desire. The weaving section is well occupied.

Although the exports statistics are not yet published, it can be definitely stated that exports of cloth for 1936 will show an appreciable increase upon those of 1935.

The wages in the spinning and weaving section have been raised, on the average, by 2.75 per cent. as a result of the increase in the cost of living.

*The following is the original report from the Association
Belge des Filateurs de Coton:—*

Les derniers mois de l'année 1936 ont été marqués par une très grande activité de l'industrie cotonnière belge.

Le carnet d'ordres des filatures est bien garni et les stocks de filés, qui avaient augmenté, se résorbent peu à peu.

Cette situation exerce une certaine influence sur les prix; cependant ceux-ci ne sont pas ce que l'on serait en droit d'en attendre.

Les tissages sont actifs.

Bien que les statistiques de l'exportation ne soient pas encore clôturées, on peut dire que les chiffres des exportations de tissus pour 1936 seront en progression appréciable sur ceux de 1935.

Les salaires des filatures et des tissages ont subi une hausse générale de 2.75 pour cent eu égard à l'augmentation du coût de la vie.

CHINA.

Spinners' margins widened during November, in spite of higher prices for cotton, as a result of a still more rapid increase in yarn prices. Spinners' margins are now the largest in recent years. The increase in the price of cotton goods during November has been attributed to increased demand resulting from improved economic conditions and to a belief in some quarters that inflation is in prospect. Stocks of textile goods in China are very low at the present time.

(United States Department of Agriculture.)

CZECHO-SLOVAKIA.

Business in the Czecho-Slovakian cotton-spinning section during the second half of 1936 was on the whole good. We estimate that mills were occupied on an average 75 per cent. of full capacity. On the whole, the Egyptian spinning section was better occupied than the American section.

Owing to the voluntary sales restriction last autumn and through the medium of a quota system, which came into operation during December, yarn prices improved. In spite of the rise in raw material, spinning margins show an improvement.

The development of the export trade has been as follows:—

EXPORTS OF COTTON YARNS AND GOODS

				3rd Quarter, 1936 (quintals)	3rd Quarter, 1935 (quintals)
Cotton yarns	..	..	..	38,239	33,898
Cotton goods	..	..	..	25,570	28,045
Total	..	..	..	<u>63,809</u>	<u>61,943</u>

The original report in German runs as follows:—

Die Beschäftigung der csl. Baumwollspinnereien war im zweiten Halbjahre 1936 verhältnismässig gut. Die Betriebe konnten durchschnittlich mit 75 % ihrer Kapazität ausgenutzt werden. Allerdings war die Macospinnerei erheblich besser beschäftigt, als die Amerikaspinnerei. Durch eine freiwillige Verkaufsbeschränkung im Herbst und durch das Mitte Dezember in Kraft getretene Kontingentierungskartell, besserten sich die Garnpreise und trotz des Steigens der Rohmaterialpreise hat sich auch die Spinnmarge günstiger entwickelt.

Die Entwicklung des Exportgeschäftes ist aus nachfolgender Zusammenstellung zu ersehen:—

EXPORT VON BAUMWOLLGARNEN UND WAREN

				III. Quartal, 1936 q	III. Quartal, 1935 q
Baumwollgarne	..	..	..	38,239	33,898
Baumwollwaren	..	..	..	25,570	28,045
zusammen	..	..	..	<u>63,809</u>	<u>61,943</u>

(Hospodársky Svaz. Csl. Prádelen Bavlňy.)

ENGLAND.

MANUFACTURING SECTION.

In spite of some slight dislocation of trade, due to the disturbance in home affairs and the continuance of intense competition in foreign markets, the state of trade in the manufacturing section has shown an upward tendency, accompanied by some slight improvement in margins, which had previously been very unsatisfactory.

It is probable that this is in sympathy with the generally better tone in industry throughout the country, although exports of cotton piece goods have also been reasonably maintained.

During November an agreement was made for an increase in wages for weavers, and the new rates have been the subject of an application for legalization in due course.

SPINNING SECTION.

During the past quarter still further improvement, from a productive point of view, has taken place in the spinning section.

At active mills the working capacity during the period has been approximately 95 per cent. of full time, and the prospects are more favourable than has been the case for a considerable time past.

There has been a further extension in the adoption of minimum price maintenance agreements, the latest scheme to be adopted being one applying to Egyptian-type mule yarns. Following a ballot of this section of the trade, over 80 per cent. of the members agreed to the scheme being incorporated in a legally-binding document.

It is estimated that owners of upwards of 25,000,000 spindles are now operating under price maintenance agreements, which have done much to remove chaotic trading conditions which existed hitherto.

During the period an application for an advance in wages led to lengthy negotiations with the Operatives' Associations, and, as a result, a general advance of $9\frac{1}{2}$ per cent. on standard piece price list rates was conceded, being equivalent to an increase of 1s. $1\frac{1}{2}$ d. in the £ in the case of operatives whose list rates previously stood at $68\frac{1}{2}$ per cent. above standard, with additional increases to certain classes of workpeople, such as big piecers in mule spinning rooms, and male adult labour in ring rooms. An important clause of the wages settlement provides that all parties to the agreement shall jointly consider internal problems of reorganization in the mills with a view to removing difficulties which hinder the development of the industry.

FRANCE.

Business has been fairly brisk during the fourth quarter of 1936, and the activity of the industry, although seriously curtailed during the third quarter on account of holidays with pay in the entire industry and strikes in certain districts, has increased considerably.

If allowance is made for a certain number of concerns completely stopped which have not yet been able to restart, partial short-time is no longer being worked except owing to scarcity of qualified operatives or due to repairs to machinery. Having regard to machinery completely stopped and to plants, which for one reason or another had not at the time been put into commission, the degree of activity in the industry could, at the end of November, be estimated at 83 per cent. for the spinning section and 86 per cent. for the weaving section.

An increase in wages to the extent of 10 per cent. has been put into operation in the Roubaix-Tourcoing district during the last quarter of 1936, and an increase of 4 per cent. has been agreed to in the Lille district as from January 1, 1937. Mention must be made of the fact that the forty-hours working week has been in operation in the entire French cotton industry since January 1, 1937, at rates which were previously paid for a forty-eight hours working week; this represents a general increase of 20 per cent. on the hourly rates paid.

							3ème trimestre (Third quarter)	
							1936 Quintaux	1935 Métriques (Metric quintals)
A—Importations : (Imports)								
1. Fils de coton .. .. .	..	..	..	..	..	..	1,121	1,548
(Cotton yarn)								
2. Tissus de coton .. .. .	..	..	..	..	..	..	2,043	2,212
(Cotton piece goods),								
B—Exportations : (Exports)								
1. Fils de coton : Exportations totales .. ..	..	..	..	..	..	..	13,219	13,759
(Cotton yarn—total exports)								
Destinations : (Countries of Destination)								
Algérie, Colonies et Pays de Protectorat ..	..	..	..	..	..	..	5,182	4,958
(Algeria, Colonies and Protectorates)								
Marchés étrangers .. .. .	..	..	..	..	..	..	8,037	8,801
(Foreign markets)								
2. Tissus de coton : Exportations totales ..	..	..	..	..	..	..	91,376	99,568
(Cotton piece goods—total exports)								
Algérie, Colonies et Pays de Protectorat ..	..	..	..	..	..	..	84,240	93,481
(Algeria, Colonies and Protectorates)								
Marchés étrangers .. .. .	..	..	..	..	..	..	7,136	6,087
(Foreign markets)								

GERMANY.**SPINNING SECTION.**

The position of the cotton-spinning industry in Germany during the last quarter of the year 1936 shows no appreciable alteration. Demand for yarns of all kinds remains active.

The activity of the industry consequently remains about the same as in the previous quarter.

The following is the original report in German:—

Bericht über die Lage der Baumwollspinnerei i. 4. Quartal 1936.

Die geschäftliche Lage der deutschen Baumwollspinnereien hat auch im 4. Quartal des Jahres 1936 keine wesentlichen Änderungen erfahren. Die Nachfrage nach Gespinnsten aller Art bleibt weiterhin lebhaft.

Der Beschäftigungsgrad der Firmen konnte daher im allgemeinen auf dem gleichen Stande wie im voraufgegangenen Quartal gehalten werden.

(Fachgruppe Baumwollspinnerei der Wirtschaftsgruppe Textilindustrie.)

WEAVING SECTION.

Sales of cloth against old orders were more active in the last quarter than in the previous months. On the other hand, orders received during the last quarter were somewhat reduced when compared with those received in the third quarter of 1936.

The degree of occupation was on the whole unchanged.

The following is the original report in German:—

Der Abruf von Geweben aus früheren Abschlüssen war im letzten Quartal lebhafter als in den vorhergehenden Monaten. Dagegen hat der Neueingang von Aufträgen gegenüber dem III. Quartal etwas nachgelassen. Der Beschäftigungsgrad war im wesentlichen unverändert.

(Süddeutsche Bezirksgruppe der Fachuntergruppe Rohweberei der Fachgruppe Baumwollweberei.)

HUNGARY.

The situation in the Hungarian cotton-spinning and weaving industry during the last few months has remained unchanged on the whole. The degree of employment, the amount of business and wages shows no important alteration.

The following is the more important cotton statistical data extracted from figures for import and export:—

JANUARY TO SEPTEMBER, 1936

(In double Zentner = £200)

	Imports	Exports
Raw cotton and cotton waste ..	209,775	1,991
Cotton yarn	12,463	679
Cotton cloth	5,013	12,876

Grey and mercerized cloth make up most of the imports, but as regards exports the dominating clothing is coloured woven.

The following is the original report in German:—

Die Lage der ungarischen Baumwollspinner- und Weberei-industrie ist in den letzten Monaten in grossem Ganzen unverändert geblieben. Im Beschäftigungsgrad, Geschäftsgang und Arbeitlöhnen sind keine nennenswerteren Aenderungen eingetreten.

Die wichtigeren statischen Daten des Aussenhandels der Baumwollbranche sind die folgenden:—

JANUARY-SEPTEMBER, 1936

(In Doppelzentnern)

	Einfuhr	Ausfuhr
Rohbaumwolle u. B'wollabfälle ..	209,775	1,991
Baumwollgarne	12,463	679
Baumwollgewebe	5,013	12,876

In der Einfuhr dominieren die rohen und merzerisierten, in der Ausfuhr die buntbedruckten Gewebe.

(*Magyar Textilgyárosok Országos Egyesülete.*)

HOLLAND.

SPINNING SECTION.

Conditions in the spinning section of the cotton trade have improved during the last few months. The demand from the local mills is better than it has been for some time, and competition from other countries (England and Belgium) is less severe since the devaluation of the Dutch guilder. Most spinning mills are fully employed, and have a fair amount of orders on their books, while selling prices also have somewhat improved.

MANUFACTURING SECTION.

The demand for the home market has been rather satisfactory, partly on account of the devaluation, as a fair amount of cotton goods was bought on speculation. Stocks are not large and most weaving mills have been able to book orders for some months ahead.

The export demand is also somewhat better, partly on account of the larger sales in the Dutch East Indies, where the quotas for 1937 have been fixed for larger quantities than in the preceding year, partly on account of the improved condition in the textile industry of other countries. Competition from these countries is less severe than it has been, and although the political circumstances do not look very bright yet, most weaving mills in Holland are fairly well employed.

ITALY.

Increased activity in the Italian cotton trade as well as in the cotton mills has resulted from the stimulus provided by the devaluation of the lira, coupled with the new cotton regulations for

1936-37. Cotton buying and cotton arrivals, though still basically low, have increased substantially, and exports and exports sales of cotton goods have risen. Mill activity has been increased as a result. It would appear that the devaluation of the lira proved something of a life-saver to holders of the large stocks of over-valued cotton goods on hand a short time ago, enabling these stocks to be moved readily into export and home channels without loss.

(United States Department of Agriculture.)

JAPAN.

Yarn production in October and November amounted to 298,000 bales and 318,000 bales respectively, compared with 293,000 and 296,000 bales in the corresponding months last year, and was the largest production for these months on record with the exception of 1934. Even with no change in the number of working spindles, some increase in yarn production is expected during the next few months, and this increase will be still larger if the existing curtailment rate of 26.2 per cent. in spindle operation is reduced. Working spindles and installed spindles in October numbered 8,424,000 and 10,992,000 respectively.

(United States Department of Agriculture.)

POLAND.

DEGREE OF OCCUPATION OF COTTON MILLS

September 29 to October 25, 1936—105.42%	of full time production (48 hours)
October 26 to November 22, 1936—102.90%	" "
November 23 to December 20, 1936—105.70%	" "

EXPORTS

	Cotton yarn		Piece goods		Clothing
	value	weight	value	weight	weight
	zl.	kg.	zl.	kg.	kg.
October, 1936	3,120	949	495,485	90,804	103,663
November, 1936	3,413	972	555,426	99,101	134,626
December, 1936	2,539	724	367,160	67,384	140,407

(Zrzeszenie Producentow Przędzy Bawełnianej w Polsce.)

SWITZERLAND.

In the cotton industry the 30 per cent. devaluation of the Swiss franc has given the market a specially favourable turn as regards the quantity of business done, which is, however, mostly at the expense of old contracts put down before the devaluation, so that the manufacturer had to suffer from the increased prices of his raw material when replacing, this in addition to the fact that the prices of old contracts as compared, which had already been insufficient previously.

In spite of a temporarily heavy demand for delivery and enquiries on the old price basis the collective agreements for general restriction in production remained unchanged, and have been declared to be in force for a further year, with the

prospect of this spontaneous improvement in the market only lasting for a short time. The production capacities of spinning and doubling mills were, therefore, extended on an average to about 80 per cent. only, those of the fine and coloured weaving mills on an average to about 85 per cent., those of the coarse and medium-fine weaving mills, however, not over 75 per cent.

There were no changes in the wages, because they are still higher than those of the chief competitor countries, calculated on a gold basis after the devaluation of the currency of this country.

The original report in German runs as follows:—

Die Abwertung des Schweizerfrankens um 30 % hat der Baumwollindustrie eine mengenmässige Sonderkonjunktur gebracht, die grösstenteils auf Rechnung alter, vor der Abwertung vereinbarter Kontrakte geht, sodass der Fabrikant, nebst den vorher schon ungenügenden Preisen, noch die Verteuerung des Rohmaterials bei der Ersatzbeschaffung zu tragen hatte.

Trotz zeitweise stürmischer Lieferbegehren und Nachfrage auf alter Preisbasis wurden die Kollektivabkommen über generelle Produktionseinschränkungen, in Voraussicht der Kurzlebigkeit der spontanen Absatzbesserung, auf der ganzen Linie unverändert beibehalten bezw. für ein weiteres Jahr in Kraft erklärt. Die Produktionskapazität von Spinnerei und Zwirnerei wurde denn auch durchschnittlich nur zu ca. 80, diejenige der Fein- und Buntweberei zu ca. 85, jene der Grob- und Mittelfeinweberei dagegen nicht über 75 % ausgenützt.

Die Löhne haben keine Aenderungen erfahren, da sie auch nach der Abwertung der Landeswährung, in Gold gerechnet, immer noch über denjenigen der hauptsächlichsten Konkurrenzländer stehen.

(Schweizerischer Spinner- Zwirner und Weber- Verein.)

U.S.S.R.

Production of cotton fabrics by enterprises of the light industry amounted to 242,000,000 yards in September last year, compared with 223,000,000 yards in 1935 and 195,000,000 yards in September, 1934. Total production of these enterprises during the first three quarters of 1936 amounted to 2,120,000,000 yards, compared with 1,630,000,000 yards in 1935 and 1,606,000,000 in 1934.

(United States Department of Commerce.)



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ARGENTINA.

According to a statement made by the United States Bureau of Agricultural Economics, the National Cotton Board of Argentina hopes to bring about an expansion of cotton planting for the 1936-1937 season to 1,000,000 acres, compared with 788,000 acres in 1935-36. Last season 627,000 acres were planted in the Chaco territory, the most important cotton-producing region in Argentina, representing over 80 per cent. of the total Argentine cotton acreage. The plan for the 1936-37 season provides for an increase of 15 per cent. in the Chaco acreage. On that basis plantings outside that region would have to be increased by nearly 80 per cent. if the proposed total of 1,000,000 acres was to be realized.

Harvesting of the 1935-36 cotton crop was completed late in August. With its crop of 354,000 bales Argentina becomes the eighth most important cotton-producing country in the world, being exceeded only by the United States, India, China, Russia, Egypt, Brazil and Peru.

The Junta Nacional del Algodon (The Cotton Department of the Argentine Department of Agriculture) has recently acquired a number of new cotton varieties from the well-known cotton-seed breeding firm of Coker, of Hartsville, South Carolina, for cultivation in the new cotton zones of Santa Fé, Entre Rios and Córdoba, which are very suitable for the cultivation of cotton as they are in the sub-tropical zones.

Among the varieties acquired the following are the most important, Farm Relief No. 3, Coker Cleveland 5 No. 7, Coker's Wild No. 7, and Coker's Clewewild No. 4.

Farm Relief No. 3 is a cotton variety which yields a high percentage of lint in proportion to the seed in the boll. The amount of lint under conditions existing in the American Cotton Belt is 41.25 per cent., and on good land has been known to yield as much as 42.75 per cent. The length of staple is 27 millimetres. Another interesting characteristic of this variety is that the seed produces a high percentage of oil, namely 18.3 per cent., as against 16.1 per cent. usually obtained from other varieties grown in the same district.

Coker's Cleveland 5 No. 7 is especially characterized for its high yield per acre. The length of staple is over 26-27 mm. and the gin outturn usually 37-40 per cent.

Coker's Wild No. 7 is important because of its length of fibre, which is usually 32 mm., but it has attained a length of 35 mm.

on good soil. The gin outturn in such a long-staple cotton is naturally less than that of shorter varieties, and varies between 33 to 35 per cent.

Coker's Clewewild No. 4 is a high-yielding variety per acre, with a fibre of 27 mm. and a lint outturn of 37 to 39 per cent. at the gin.

The Cotton Department has also acquired seed of the variety produced by the Delta and Pineland Company, at Scott, Mississippi. The variety is Delta and Pineland No. 11a, which is also a high yielder and noted for its high lint outturn at the gin.

Other varieties obtained from America are the following:—

	Staple Length mm.	Outturn per cent.
Trice	25	34
Stoneville No. 5	25-28	36-41
Mebane Triumph	25-27	37-44
Rogers Improved Acala	25	36
Lone Star of Graham	25-28	38-41

Another variety obtained from America is New Boykin Elite, which is very suitable for alluvial soils. It gives a high yield per acre, in fact as much as 492 kilograms per hectare.

These new varieties, with a high lint outturn, should improve the average lint outturn for the whole of Argentine, for according to figures published by the Cotton Department, the lint outturn for Argentine in all districts is only 28.5 per cent.

It is obvious that the Cotton Department is desirous of increasing the various types of cotton grown in that country, and at the same time endeavouring to find more suitable varieties than those already grown in Argentine for the new areas opened up to cotton further North.

Exports from the Argentine for the first nine months of 1936 have already surpassed exports for the whole of 1935, as will be seen from the following table:—

EXPORTS OF COTTON FROM THE ARGENTINE

Year	Tons	Value in Argentine Dollars	Average price per ton in Argentine Dollars
1925	11,057	8,457,468	765
1926	22,642	15,247,729	673
1927	9,247	5,670,350	613
1928	17,911	11,519,120	643
1929	23,598	16,338,409	692
1930	27,597	19,572,554	709
1931	25,018	13,299,286	532
1932	28,272	13,760,514	487
1933	20,564	11,012,784	536
1934	27,112	20,417,461	753
1935	36,329	27,479,436	756
1936 (nine months) ..	41,390	32,426,025	783

The Cotton Department estimates that the total crop of 76,000 tons of lint will be produced upon 317,019 hectares during the present cotton season, 1935-36, as against 64,000 tons last season. Exports of cotton now form 2.86 per cent. of the value of all exports from the Argentine.

ANGLO-EGYPTIAN SUDAN.

Cotton exports for the 12 months ended July 31, 1936, totalled 107,000 bales (of 400 lbs. each), compared with 158,000 bales for 1934-35, according to official statistics.

(Textile Raw Materials.)

BELGIAN CONGO.

Cotton production for 1935-36 is placed at 26,278 metric tons (of 2,205 lbs. each) compared with 22,384 tons in 1934-35, according to official statistics. The Southern crop, raised in districts south of the equator and picked during August and September, amounted to 9,111 tons against 6,051 in 1934-35, and the Northern crop, raised in districts north of the equator and picked during February and March, amounted to 17,167 tons compared with 16,333 in 1934-35.

The Southern crop for 1936-37 is estimated by the Department of Agriculture of the Colonial Government at 11,035 tons. Production of cotton in the Belgian mandated territory of Ruanda-Urundi in 1935-36 totalled 569 metric tons and the 1936-37 crop is placed at 667 tons.

Cotton exports in 1935-36 totalled about 26,000 metric tons. All cotton from Belgian Congo and from the Belgian mandated territory is shipped to Belgium. There is one cotton mill in Belgian Congo which consumes about 1,200 tons annually.

(Textile Raw Materials.)

BRAZIL.

Figures have recently been published showing the quantities of cotton classified in the State of São Paulo during the period March to October of the past two years, from which it appears that, as regards both quantity and quality, 1936 showed considerable advance on the previous year, as follows:—

Class ..	Bales		Kilos		Percentages	
	1935	1936	1935	1936	1935	1936
1 ..	258	—	41,277	—	0.04	—
2 ..	4,362	3,389	714,583	566,397	0.76	0.32
3 ..	25,704	90,462	4,221,091	15,589,060	4.58	8.98
4 ..	70,195	295,997	11,816,169	51,334,408	12.52	29.58
5 ..	170,533	355,113	28,801,890	61,549,875	30.53	35.47
6 ..	154,863	177,011	26,038,198	30,566,485	27.60	17.61
7 ..	84,506	58,593	14,135,777	10,049,429	14.99	5.79
8 ..	36,004	17,105	6,051,272	2,919,512	6.41	1.69
9 ..	11,517	4,303	1,922,978	731,074	2.04	0.42
Inferior to 9	2,989	1,447	496,271	240,160	0.53	0.14
Total	560,931	1,003,420	94,239,506	173,546,400	100.00	100.00

Exports of cotton from Brazil totalled 742,918 bales of 478 lbs. net weight in the season ended July 31, 1936. This was only a small increase over shipments of 736,455 bales in the 1934-35 season, but was nearly nine times as large as the average of 86,000 bales in the 10 years ended July 31, 1933. Comparing the destinations of exports in 1935-36 with those of the preceding year, de-

creases occurred in shipments to Great Britain, Germany, France and Belgium, while larger amounts went to Holland, Italy, and especially Japan. Exports to Japan were 135,500 bales, compared with only 11,000 in 1934-35 and 7,738 in 1933-34.

Should the 1936-37 crop in Southern Brazil show a significant increase over the last season the total 1936-37 Brazilian crop will likely exceed the record crop of 1935-36, since the current crop in Northern Brazil is now estimated (by the Brazilian Government) to be approximately the same as in 1935-36. The present tentative estimate of the total 1936-37 Brazilian crop being used by the Bureau of Agricultural Economics is 1,800,000 bales, compared with a crop of 1,700,000 bales in 1935-36 and an average for the 10 years ended 1932-33 of 500,000 bales.

CONTROL OF GINNERIES.

The Commercial Secretary to H.M. Embassy at Rio de Janeiro in a report dated November 27 states that according to the local press of November 22 a draft law has been sent to the Chamber of Deputies by the President of the Republic, which has as its object the restriction of the activities of cotton ginning and baling concerns, in order to avoid any likelihood of a monopoly in this industry, in any state, by one company or combine.

The Bill as drafted by the Ministry of Agriculture reads as follows:—

Article 1.—No national or foreign concern located in Brazilian territory may own or control, in any one state, more than 15 per cent. of the total number of saws or rollers of cotton gins, or baling or repacking presses in that state.

Sole Paragraph.—The prohibition referred to in this paragraph does not apply to organized co-operative institutions of cotton producers, nor to states in which production is only in its initial stage, which exception will be dependent on the decision of the Ministry of Agriculture after consideration.

Article 2.—The Ministry of Agriculture, in collaboration with the state Governments, will determine the location of such ginning mills as may be installed in the country after the date of publication of this law.

Article 3.—Contrary dispositions are revoked.

BRITISH WEST INDIES.

Cotton exports for the 12 months ended July 31, 1936, from St. Vincent totalled 502,000 lbs., valued at £32,460, according to official figures. These exports include 390,000 lbs. of Sea Island cotton, and 68,000 of Marie Galante. Production in 1935-36 is estimated at 465,000 lbs. from 4,261 acres.

Cotton exported from Montserrat for the 12 months totalled 2,453 bales, weighing 1,018,000 lbs., valued at £54,802. Production in 1935-36 totalled 1,016,000 lbs. from 4,438 acres.

Production in St. Kitts-Nevis totalled 352,000 lbs. from 2,550 acres, the entire crop being exported to the United Kingdom.

The exports from Barbados totalled 11,000 lbs., and the production was estimated at about 10,000 lbs. for 1935-36.

(Textile Raw Materials.)

ST. VINCENT.

According to the most recent estimate the area cultivated to Sea Island cotton in 1935-36 was 3,540 acres against 1,464 in 1934-35 and 1,880 on the average of the five seasons ending 1933-34; percentages 242.1 and 188.3. The corresponding production of ginned cotton is estimated at about 3,970 centals (830 bales of 478 lbs.) against 1,737 (363) and 2,518 (527); percentages 228.6 and 157.7.

According to a provisional estimate the area under Sea Island cotton this year is about 5,000 acres against 3,540 in 1935-36 and 1,821 on the average of the five seasons ending 1934-35; percentages 141.2 and 274.5.

The area cultivated to Marie Galante in 1935-36 was 721 acres against 652 in 1934-35 and 911 on the average of the five years ending 1933-34; percentages 110.6 and 79.1. The corresponding production of ginned cotton is estimated at about 683 centals (143 bales of 478 lbs.) against 386 (81) and 628 (131); percentages 177.1 and 108.8.

According to a provisional estimate the area under Marie Galante this year is about 700 acres against 721 in 1935-36 and 820 on the average of the five years ending 1934-35; percentages 96.9 and 85.2. (*International Institute of Agriculture.*)

CHINA.

The Chinese Cotton Statistics Association, 200, Avenue Edward VII, Shanghai, published on December 31, 1936, its final estimate of the cotton crop in China for 1936 as follows:—

Area	..	345,357,140 ares, excluding 1,686,405 ares of abandoned area
Yield	..	8,485,651 quintals (metric)

The above figures are based on the final reports received from Hopeh, Shantung, Shansi, Honan, Shensi, Hupeh, Hunan, Kiangse, Anhwei, Kiangsu, Chekiang, Szechuen, and the two municipalities of Shanghai and Tientsin.

For comparison the figures of area and yield published in the first and second estimates of 1936, and the final estimates of 1935, 1934, 1933 and 1932 are given below:—

		Area (ares)	Yield (quintals)
Second estimate, 1936	.. ..	345,862,422	8,468,644
First estimate, 1936	.. ..	338,172,310	9,606,397
Final estimate, 1935	.. ..	215,199,013	4,924,750
Final estimate, 1934	.. ..	276,303,446	6,774,856
Final estimate, 1933	.. ..	248,549,517	5,911,342
Final estimate, 1932	.. ..	227,941,171	4,902,207

GREECE.

The Greek Agricultural Bank, by virtue of an agreement with the State, has commenced the purchase of ginned cotton of the 1936 crop, one of the objects of this action being to prevent any great fall in prices due to the dullness which has prevailed on the cotton market of late. The 1936 crop is expected to yield 12,000,000 oka ginned cotton which, together with stocks of 1,000,000 oka, will give a total of 13,000,000 oka. As a much greater yield is expected this year, the Agricultural Bank has

decided to release about 1,000,000 oka raw cotton for export. This, it is stated, will be the first time that Greek cotton has been exported.

The Ministries of Economy and Finance have decided that a bounty of six drachmae per oka (one oka = 2,832 lb.) is to be paid to exporters of indigenous cotton exported to countries which pay with free foreign currency. The exporter is also exempt from all export levies and taxes. *(Textile Weekly.)*

The cotton crop of 1936 is placed at about 124,000,000 lbs. of seed cotton, according to the October 15 estimate of the Greek Cotton Institute. This compared with the previous estimate of 150,000,000 lbs., but is considerably larger than the 1935 crop, estimated at 105,000,000 lbs. *(Textile Raw Materials.)*

According to information received from the Greek Cotton Institute, weather conditions this year have been rather unfavourable to cotton production. The rains hampered the opening of the bolls and favoured the spread of boll-worm. In spite of this information from the Cotton Institute, an unofficial source anticipates an abundant crop, due partly to the very considerable increase in area sown to cotton, and partly to a normal unit-yield per acre. *(International Institute of Agriculture.)*

GUATEMALA.

Cotton production is insignificant, having amounted to about 70,000 lbs. of seed cotton from 193 acres in 1934-35. It is difficult to secure statistical information on cotton production, owing to the fact that much of the cotton is grown in small plots. In an effort to encourage cotton production, a local cotton manufacturer has offered free planting seed to growers as well as other inducements. *(Textile Raw Materials.)*

INDO-CHINA.

It is estimated that the area planted to cotton in Cambodia in 1935 was about 5,000 hectares (of 2.471 acres each), which produced a crop of about 500 metric tons (of 2,205 lbs. each). The area planted to cotton in Annam is placed at around 4,000 hectares. Cotton is grown in Cochin-China and other districts. No figures are available on the total production of cotton in Indo-China.

Exports of ginned cotton in 1935 totalled 196 tons against 173 in 1934, the bulk being shipped to China and Hong Kong. Exports of seed cotton totalled 529 tons in 1935 and 1,016 in 1934, the bulk going to Japan. *(Textile Raw Materials.)*

IRAN.

The Cotton Company, established two years ago with the object of improving the crop, has taken over several thousands of hectares for cotton, which is being grown recently all over the country. The

Company has also built special storehouses at Shiraz, Isfahan, Qum and Meshed for storing cotton in the best conditions.

(International Institute of Agriculture.)

IRAQ.

Estimates of the 1936 cotton crop run as high as 10,000 bales of 400 lbs. each. The final outturn, however, depends upon the success of measures taken against the attack of the boll-worm. The crop was 4,405 bales in 1935 and 2,028 in 1934.

(Textile Raw Materials.)

ITALY.

According to a decree published in the official press, all growers producing cotton in 1936 will be obliged to deliver their cotton exclusively to the Italian Cotton Institute, which will purchase and distribute the cotton according to prescribed rules. Preparation of the cotton must be carried out only at centres recognized as suitable by the appropriate authorities. The Italian Cotton Institute is authorized to carry out the necessary credit operations in connection with the decrees.

(Textile Raw Materials.)

NYASALAND.

Cotton exports from this British Protectorate in Africa totalled 8,194,000 lbs., valued at £204,851, according to official returns. For the first seven months of 1936, exports totalled 540,000 lbs.

The 1935 cotton acreage comprised about 2,067 acres planted by European growers and 82,000 by native growers, with the production estimated at 2,258,000 and 7,550,000 lbs. lint respectively—a total of 9,800,000 lbs. or 21,000 equivalent bales of 478 lbs.

(Textile Raw Materials.)

PERU.

Production and exports of cotton have shown a constant increase within the past five years, according to official and trade data. Details for the past five calendar years are shown below:—

	1935	1934	1933	1932	1931
Area, hectares of 2,471 acres. .	162,088	148,517	130,481	123,065	126,890
Production, metric tons					
(2,205 lbs.) ..	85,175	74,945	60,228	52,573	50,700
Exports, metric tons ..	77,922	67,934	54,833	46,907	46,896
Value (1,000 soles) ..	80,777	81,812	60,764	34,130	30,869
Value per kilo (soles) ..	1.04	1.20	1.11	0.73	0.66
Consumption, metric tons ..	7,253	6,210	5,395	5,666	3,804

(United States Department of Commerce.)

PHILIPPINE ISLANDS.

Cotton production from seeds distributed by the Philippine Bureau of Plant Industry in 1936 amounted to about 750,000 lbs. of seed cotton, the Bureau reports. The total 1936 crop is estimated at 1,200,000 lbs. of seed cotton from about 2,000 hectares of 2.471 acres each. The crop was substantially larger than in 1935. (*United States Department of Commerce.*)

QUEENSLAND.

During September and October harvesting of the Queensland cotton crop continued at a surprisingly good rate, the season's total, up to the end of September, being 13,383 bales. Of this 9,406 bales were ginned at Glenmore and 3,977 at Whinstanes. The qualities and grades of the crop have been particularly good, the continuance of dry and windy conditions being favourable to the cotton grower, such climatic condition allowing the top bolls to be gathered in a very satisfactory condition for treatment at the ginnery. The lack of rain has resulted in most of the cotton being unstained and of beautiful purity.

Seed distribution for the next crop continues at a good rate, the total seed issued to growers up to the end of September being sufficient to plant a little over 40,000 acres. The greater proportion of the seed supplied to cotton farmers is of varieties producing short to medium staple, harder bodied cottons, such being the requirements of the Australian cotton spinners.

(*Textile Journal of Australia.*)

ROUMANIA.

Cotton imports in 1935 totalled 5,999 metric tons (of 2,205 lbs. each), compared with 5,707 in 1934 and 4,957 in 1933. Most of the cotton in 1935 come from Egypt, imports for that country accounting for 4,326 tons. Direct imports from the United States totalled only 241 tons in 1935 as against 2,629 in 1934. American cotton is also imported indirectly from Germany and the Netherlands, but no imports from Germany were recorded in 1935 as against 195 tons in 1934, and imports in 1935 from the Netherlands amounted to 196 tons against 1,923 in 1934.

COTTON PRODUCTION.

The area planted in cotton in 1935 is estimated at 919 hectares of 2.471 acres each), compared with 645 in 1934 and 2,198 in 1923, according to official figures. Production is estimated at about 935,000 lbs. of seed cotton in 1935 and 507,000 in 1934.

(*Textile Raw Materials.*)

SALVADOR.

The 1935 crop is placed at about 3,000 bales by local merchants. However, reliable production figures are not yet available. Estimates of local consumption are in the neighbourhood of 4,000 bales. The cotton crop of 1936 will be greatly reduced, and some cotton brokers estimate that it will amount to no more than two-

thirds of last year's crop, due to the damage by the boll-weevil. It is said that some growers are discouraged with the result and will therefore reduce cotton planting. (*Textile Raw Materials*).

SOUTHERN RHODESIA.

Cotton exports in 1935 totalled 175,000 lbs. compared with 248,000 lbs. in 1934, according to official statistics. All cotton was shipped to the United Kingdom.

The Cotton Research and Industry Act, which was adopted at the recent session of the Southern Rhodesian Parliament, provides for a Board to supervise research work on cotton and on insect pests and diseases affecting cotton and other matters connected therewith, and to assist the development of the cotton industry in the Colony. (*Textile Raw Materials*.)

SUDAN.

The Sudan Government, Department of Agriculture and Forests, Khartoum, has issued its cotton progress report for the month ending November 30, 1936, season 1936-37, as follows:—

	Estimated Total Yield		Picked to Date		Area under Crop	
	Bales of approx. 400 lbs. Lint				Feddans	
	1936-37	1935-36	1936-37		1936-37	1935-36
	Nov.	Oct.	Nov.	Oct.	Nov.	June
Sakellaridis Irrigated:—						
Gezira { S.P.S., Ltd. * — — } 152,807 { — — } 167,288 164,178						
{ K.C.C. .. * — — } — — { — — } 31,837 20,562						
Tokar 20,000 — — 19,308 — — 45,000 14,053						
Kassala 15,000 — — 8,507 — — 32,500 36,257						
Dueim (Government Estates) 500 — — 16,125 — — 500 500						
Gondal (Government Estates) 450 — — 693 — — 450 7,570						
Private Estates 9,030 — — 5,649 — — 10,909 —						
Total Sakellaridis Irrigated — — 202,889 — — 288,484 243,120						
American Irrigated—						
Northern Province:—						
Berber (Government Pump Schemes) .. 2,844 2,712 1,650 2,781 2,560 2,494 2,549						
Dongola (Government Pump Schemes) .. 2,250 2,250 4,296 — — 2,274 2,302						
Zeidab (Private Estates) 5,300 5,150 5,154 5,282 5,136 5,269 5,561						
Other Private Estates 1,000 895 866 891 891 1,625 1,400						
Total American Irrigated .. 11,394 11,007 9,966 8,954 8,587 11,662 11,812						
American rain-grown:—						
Kordofan 37,300 37,300 22,910 1,380 40 125,000 95,000						
Upper Nile 1,110 2,062 1,283 — — 8,500 6,800						
Equatorial 5,550 5,550 5,502 — — 27,800 21,236						
Total American rain-grown .. 43,960 44,912 29,695 1,380 40 161,300 123,036						
Total all varieties — — 242,550 10,334 8,627 461,446 377,968						

* Crop good.

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TURKEY.

The 1935 cotton crop is variously estimated by different trade sources at 193,000 to 225,000 bales of about 440 lbs. each. It is generally estimated by trade sources that the domestic mills will consume about 70,000 bales of the 1935 crop. Consumption from the 1936 crop is expected to show an increase, owing to the growing requirements for raw materials because of the expansion of the local industry. Upon the completion of the new mills being erected, it is said that consumption will increase by about 40,000 bales.

According to official figures, exports of cotton in 1935 totalled 15,589 metric tons of 2,205 lbs. each. Practically no cotton is being imported into Turkey at the present time.

(Textile Raw Materials.)

UGANDA.

In a summary of the prospects for the Uganda cotton crop, H.M. Eastern African Dependencies Trade and Information Office state that in general the dry weather conditions during November adversely affected the crop prospects. At the latter end of the month rains were fairly general, and there was some improvement in crop condition. The crop is remarkably free from insect pests and diseases. The absence of rain in November in the short grass areas is estimated to have reduced the crop by 50,000 bales, but the condition of the crop as at the end of November warrants an estimate of 330,000 bales.

U.S.S.R.

Cotton cultivation in the U.S.S.R. has extended north of the cotton belt to regions such as Northern Caucasus, Azov-Black Sea area, the Crimea, Volga territory, and the Ukraine. Only nine years ago an area of only 400 hectares in those regions was sown with cotton—now there are 435,000 hectares, and in 1937 there will be 520,000 hectares. The new cotton-growing regions are plentifully equipped with tractors and special agricultural machinery, and some 90 per cent. of the basic agricultural processes—tilling, sowing, etc.—are mechanized.

Cotton picking throughout the country's 4,793,450 acres under cotton has progressed at such a rate that there is every indication that the plan for the completion of picking by December 1, and delivery to the mills by December 10, will be fulfilled before these dates. By October 10, more than half the crop had been gathered: in 1935, a bumper cotton year, only 45.5 per cent. had been gathered at that date.

Tadzhikistan is in the lead this year for cotton delivery to the State, 79.7 per cent. of its quota having been delivered by October 10, as against 46.4 per cent. by the same date last year. Total cotton deliveries to the State amounted to 53.6 per cent. of the plan on October 10. Turkmenistan assumed second place with a delivery of 69.4 per cent., and Uzbekistan, the principal cotton-growing republic, came third with 56 per cent. of its deliveries. The Azov-Black Sea area, where cotton is a new crop, made one-third of its State deliveries by October 10.

The first month of this year's harvest season indicates that the yield per acre will be well above the plan, which called for 0.44 tons for irrigated areas and 0.38 tons for non-irrigated areas. At Geogtininsk in Turkmenistan, 0.48 tons per acre of Egyptian cotton was gathered during the early harvest period and a yield of at least 0.8 tons is likely by the end of the season. Harvest brigades in Turkmenistan are aiming at 2.8* to 3.2 tons per acre. In 1937 the area under cotton will include 2.5 million acres of a high quality American upland variety as against 1,875,000 acres planted this year. Egyptian cotton, which ranks still higher in quality, was planted on more than 312,000 acres this year.

*(Extracted from the Monthly Review of the U.S.S.R.
Trade Delegation, November, 1936.)*

According to the data published on November 15 by the People's Commissariat for Agriculture, the plan for deliveries of unginned cotton, which had fixed 1,877,520 metric tons for the whole Union, has been entirely realized this year a month prior to the date fixed.

The quantities of cotton picked and delivered so far exceeded by 485,000 tons those at the corresponding period last year. The quantities picked and delivered this year are 170,000 tons larger than the total delivered during the past year. Of the quantities delivered 80 per cent. is of first quality and 70 per cent. of long staple ($1\frac{1}{8}$ ins. to $1\frac{3}{8}$ ins.). In the irrigated areas the average yield is 1,070 lbs. unginned cotton per acre.

(International Institute of Agriculture.)

According to information received from the Cotton Department, 4,700,000,000 lbs. of unginned cotton had been picked and delivered to the State by December 1. In the flooded fields the unit-yield was 1,150 lbs. per acre of unginned cotton. Picking and delivery of cotton to the State was still in progress. In 1937, i.e., the last year of the second five-year plan, the crop of unginned cotton is expected to be 4,685,000,000 lbs.; therefore the plan has been realized a year in advance.

(International Institute of Agriculture.)

WORLD'S COTTON PRODUCTION AND CONSUMPTION.

According to a United States Department of Agriculture Report dated Washington, November 5, 1936, a record production of world cotton this season is indicated.

The Department states that estimates of 29,100,000 bales for the 1937 season compared with 26,500,000 bales last season and the previous record production, 10 years ago, of 27,471,000.

If the estimates are realized, the United States will supply 40 per cent. of the world production this season.

* Presumably cotton and seed, the lint yield would therefore normally be a third of this weight.

America produced 63.3 per cent. of the world cotton in the previous season of 1926-27, and an average of more than half of the world crop, 56.26 per cent., for the 10 years ended in 1933.

The world survey showed China, India, Egypt, Brazil, Manchuria, Russia and other cotton-producing countries have been increasing cotton production in recent years while the output of U.S.A. has been declining.

According to the survey the total world mill consumption of cotton for the season recently ended was 26,800,000 bales, an increase of 6 per cent. over the previous season and nearly 14 per cent. greater than the average for the 10 years ended in 1933.

Consumption of American cotton advanced from 12 per cent. over the previous season, but was 6 per cent. below the 10-year average. Conditions were said to favour a world consumption this season equal to or higher than last, but the consumption of American cotton by the world was said to depend "upon the availability and price of American cotton relative to the supply and price of foreign cotton," and upon nationalistic measures affecting cotton consumption in certain countries.

Most of the increase in American cotton consumption last season was attributed to gains in the United States. Cotton mill consumption in America during September was said to have been nearly 40 per cent. larger than the same month last season, and "the largest consumption for any September on record."

The United Kingdom accounted for most of the increased foreign consumption of American cotton last season, it was said, while Indian and Brazilian cotton increased at the expense of American in the Japanese market.

With America producing a smaller per cent. of the world cotton supply the Department states, "changes in the supply of American cotton tend to have a considerably smaller influence upon world cotton prices in general and, to some significant extent, a lesser influence upon the price of American cotton."

IRRIGATION PLANS AND PROJECTS FOR MEXICO IN 1937.

According to the weekly publication issued by the Mexican Ministry of Foreign Relations, Department of Publicity, the value of crops harvested this year from lands reclaimed by works carried out by the National Irrigation Commission, amounts to no less than 32,000,000 pesos.

For next year a vast plan of action is contemplated for construction of small and middling sized irrigation works in nine States of the Federation.

Parties of engineers belonging to said Commission have been sent out to make necessary surveys and begin location work at a number of points in the States of Oaxaca, Guerrero, Coahuila, Tamaulipas, Chihuahua, Michoacan, Guanajuato, Jalisco and San Luis Potosi. As the cotton-growing areas are situated in these States, it is reasonable to assume that the cotton-growing industry will benefit from these measures.

COTTON PRODUCTION IN THE PRINCIPAL PRODUCING COUNTRIES.

We are indebted for the following tabulations to Mr. W. H. Slater, of the Lancashire Statistical Service, 49, Deansgate, Manchester:—

WORLD CARRY-OVER BY GROWTHS—SPECIFIED PERIODS

(In millions of bales)								
Season beginning August 1	American			Outside Growths				Total all growth
	In United States	In foreign coun- tries	Total	Indian	Egypt- ian	Sun- dries	Total	
Average 1923-24 to 1932-33 ..	3.7	2.3	6.0	2.4	.9	.9	4.2	10.2
1932-33 ..	9.6	3.4	13.0	1.8	1.4	.9	4.1	17.0
1933-34 ..	8.1	3.5	11.6	2.5	1.0	1.0	4.5	16.1
1934-35 ..	7.6	3.0	10.6	3.0	1.0	1.6	5.6	16.2
1935-36 ..	7.1	1.9	9.0	2.3	.8	1.7	4.8	13.8
1936-37* ..	5.4	1.7	7.1	2.6	.7	1.9	5.2	12.2
1936-37 as per- centage of av.	% 143.2	% 73.9	% 116.7	% 108.3	% 77.8	% 211.1	% 123.8	% 119.6

* Preliminary.

PRODUCTION IN PRINCIPAL PRODUCING COUNTRIES—SPECIFIED PERIODS

		In millions of bales						1936-37 as a % of aver.
		Ten-year aver. 1923-4 to 1932-3	1932 to 1933	1933 to 1934	1934 to 1935	1935 to 1936	1936 to 1937	% aver.
Country or region		1923-4 to 1932-3	1933	1934	1935	1936	1937	%
U.S.A. . . . .	..	14.4	13.0	13.0	9.6	10.6	12.4	86.1
Outside countries	..	11.2	10.9	13.7	14.2	15.9	17.5	156.3
India . . . . .	..	4.5	3.9	4.3	4.1	4.8	5.0	111.1
Egypt . . . . .	..	1.5	1.0	1.8	1.6	1.8	1.9	126.7
Sundries . . . . .	..	5.2	6.0	7.6	8.5	9.3	10.6	203.8
China . . . . .	..	2.1	2.3	2.7	3.1	2.6	3.6	171.4
Russia . . . . .	..	1.1	1.8	1.9	1.7	2.2	2.5	227.3
Brazil . . . . .	..	.5	.4	1.0	1.4	1.7	1.8	260.0
Other countries	..	1.5	1.5	2.0	2.3	2.7	2.7	180.0
World total . . .		25.6	23.9	26.7	23.8	26.5	29.9	116.8

* Very tentative estimates, particularly in the case of India, Brazil, Russia, and a number of the smaller producing countries where much of the crop is not ready for market until the first or second quarter of 1937.

WORLD SUPPLY BY GROWTHS—IN MILLIONS OF BALES

Season beginning August 1		Ameri- can	Indian	Outside Egypt	Growth Sund.	Total	Total all growths
Average 1923-32	..	20.4	6.8	2.5	6.1	15.4	35.8
1932-33	.. ..	26.0	5.7	2.4	6.9	15.0	41.0
1933-34	.. ..	24.6	6.8	2.8	8.6	18.2	42.8
1934-35	.. ..	20.3	7.0	2.6	10.1	19.7	40.0
1935-36	.. ..	19.6	7.1	2.6	11.0	20.7	40.3
1936-37†	.. ..	19.4	7.6	2.6	12.5	22.7	42.1
1936-37 as percentage of average	.. ..	% 95.1	% 111.8	% 104.0	% 204.9	% 147.4	% 117.6

* All cotton other than American, Indian, and Egyptian.

† Preliminary.

International Trade in Cotton.

The United States Department of Agriculture, Bureau of Agricultural Economics, in a publication entitled "Statistics Relating to International Trade in Cotton and Linters, 1921-1935," makes the following interesting observations:—

Cotton is the most valuable single agricultural product entering the channels of world trade. World exports during recent years have averaged between 12,000,000 and 13,000,000 bales annually. Net exports from all the principal producing areas during the last five years, 1931-1935, averaged 12,227,000 bales. This figure represents a decline from the 1926-1930 average when net exports stood at 12,999,000 bales, but an increase over the 1921-1925 average of 11,317,000 bales. It is slightly below the 1909-1913 average of 12,522,000 bales.

The United States, British India and Egypt, the three largest cotton-exporting countries, supplied 95.9 per cent. of the world cotton exports during the five years, 1909-1913, preceding the World War. During the last five years for which data are available, 1931-1935, approximately 90.7 per cent. of the cotton entering into international trade came from those sources. In recent years, exports from South American countries, particularly Brazil, have shown a substantial increase, but their proportion of world exports is still comparatively small. China and Russia are large producers of cotton, but production has ordinarily been inadequate to meet domestic requirements, and until very recently both of these countries have been substantial importers of cotton.

The United States occupies the leading position among cotton-exporting nations, supplying 60 per cent. of all the cotton entering into world trade over the five years from 1931 to 1935. However, the position of the United States during this recent period is relatively less important than before the World War or than during the five-year period, 1926-1930, although higher than the 1921-1925 average. In 1909-1913, 68.8 per cent. of the world cotton exports came from the United States, 15.6 per cent. from British India, 11.5 per cent. from Egypt, and only 1.4 per cent. from South American

countries. Over the last five years, the United States supplied 60 per cent. of the total, British India 17.5 per cent., Egypt 13.2 per cent., and South America 5.3 per cent.

Average net exports from the United States, which amounted to 8,012,000 bales in 1926-27 to 1930-31, dropped to an average of 7,336,000 bales during 1931-32 to 1935-36, a decline of 8 per cent. In comparison with the five pre-war years, there was a decline of 15 per cent.

The peaks of the United States export trade in cotton during the post-war years were reached in 1926-27 and in 1931-32, when net exports amounted to 10,900,000 bales and 9,081,000 bales, respectively. From 1931-32 to 1934-35 the trend was downward, exports declining to 4,925,000 bales in 1934-35, the smallest figure in more than a decade. Some of this loss was regained in 1935-36, when net exports rose to 6,099,000 bales.

British India ranks next to the United States as an exporter of cotton, average net exports during 1909-10 to 1913-14 amounting to 1,957,000 bales. Though subject to considerable fluctuation, India's cotton exports have increased slowly, and during the last five years have averaged 2,133,000 bales.

Egypt is the world's third largest exporter of cotton, but of the periods covered in this publication, only the figures for the last five years show any noticeable gain. Average exports for 1931-32 to 1935-36 amounted to 1,620,000 bales, while prior to 1930-31 exports showed little variation on the basis of the 5-year averages, amounting to somewhat less than 1,500,000 bales in 1909-1913, 1921-1925, and 1926-1930.

Exports of cotton from South American countries have gradually increased since pre-war years, and have shown a sharp upturn within the past two or three years. The combined exports from Brazil, Peru and Argentina, which averaged 166,000 bales during 1909-1913, rose to an average of 299,000 bales during 1921-1925, and 657,000 bales during the last five years, 1931-1935. Exports from these three countries, which totalled 418,000 bales in 1931, increased to 1,006,000 bales in 1934 and to 1,138,000 bales, or more than 9 per cent. of the world total, in 1935.

During the last five years, 1931-1935, average exports from Brazil amounted to 273,000 bales. This was double the amount sent abroad during 1926-1930 and more than three times as much as was exported before the World War. Exports in 1935 amounted to 630,000 bales, a peak figure, and in 1934 to 584,000 bales, the highest up to that time.

Average net exports from Peru, which before the World War, 1909-1913, amounted to 83,000 bales annually, increased to 223,000 bales in 1926-1930 and in 1931-1935 to 258,000 bales.

Net exports of raw cotton from Argentina also show an upward trend, rising from 11,000 bales in 1921 to 167,000 bales in 1935.

Certain of the newer cotton-producing countries of Africa have also made considerable progress in increasing their export trade in cotton. Kenya and Uganda, which during the five pre-war years exported an average of 16,000 bales, exported an average of 91,000 bales in 1921-1925 and in 1933 had reached a record export figure of 248,000 bales. During the last five years, 1931-1935, exports from the Anglo-Egyptian Sudan have averaged 131,000 bales, as compared to an average of only 12,000 bales during the pre-war years of 1909-1913.

Cotton Bale Enquiry.

For many years past the International Federation has constantly been receiving enquiries concerning the weights, densities, measurements, details relating to covering and banding of cotton bales produced in various parts of the world. From time to time figures have been published in the press giving the weights of cotton bales, but these figures usually only applied to the major cotton-growing countries. It occurred to us, therefore, that if this information could be collated for every individual cotton-growing country a useful purpose would be served. Accordingly, during the summer of last year, we circulated an enquiry form to firms of cotton exporters, to growers, ginneries, Government seed breeding and cotton research stations, Government officials, trade and agricultural commissioners overseas, and to anyone whom we thought could supply the necessary information. As some of these countries are so far away, it has naturally taken some time for replies to come to hand, but, as may be determined by an examination of the tabular matter which follows, a very comprehensive and representative reply has been received.

We wish to take this opportunity of tendering our thanks to all who have in any way contributed to the success of this enquiry. Our thanks are due in particular to the British Government Department of Overseas Trade, British Consuls, Agricultural and Trade Commissioners abroad, the Association Cotonnière Coloniale of Paris, the Compagnie Cotonnière Congolaise of Brussels, the British Cotton Growing Association, the Associazione Italiana Fascista degli Industriali Cotonieri of Milan, the Argentine Ministry of Agriculture, the Queensland Cotton Board, the Hellenic Cotton Institute of Athens, the Kantoor voor den Handel van het Departement van Economische Zaken of Batavia, the Peruvian Ministry of Agriculture, the Siamese Ministry of Agriculture and Fisheries, the U.S.S.R. People's Commissariat for Foreign Trade of Moscow, the Puerto Rico Marketing Association for Minor Crops, the Egyptian Ministry of Agriculture, the Yugoslavian Ministry of Agriculture, Belgrade, Algiers Chamber of Commerce, and many cotton exporters and merchants in various parts of the world.

The questionnaire ran as follows :—

- A. 1. What are the overall measurements of the bale ?
2. What is the average weight per bale ?
Gross. Net (less covering and bands).
3. What is the average density of a cotton bale per cubic foot or cubic metre ?

- B. 1. What type of covering (tare) is used, i.e., jute, hemp, sisal, cotton, etc., open or close mesh?
 2. Weight of covering (tare) used per yard.
 3. Total weight of covering per bale.
 4. How many yards of covering used per bale?
- C. 1. How many bands (ties) or wires are used per bale?
 2. What are the dimensions of each band or wire?
 3. What is the total weight of all bands or wires used per bale?
 4. How are the bands or wires joined: by buckles, rivets, or merely tucked in or twisted?
- D. 1. Is the cotton produced in your country roller and/or saw-ginned?
 2. Is the bale pressed for export at the gin or is it finally pressed elsewhere?
 3. If finally pressed elsewhere, how many interior bales are required to make an export bale?
 4. What is the range of staple lengths produced in your country?
 Minimum Maximum
5. What staple length is chiefly produced?
 6. Give particulars of any ginning or export taxes levied.
 7. Please give, if possible, exports of cotton in bales for the last five seasons or years.

The following conversion factors will be found useful in studying the tabulations:—

To convert				Multiply by
Inches into metres	...	...	...	0.0254
Metres into inches	...	...	...	39.370
Inches into centimetres	...	...	...	2.540
Centimetres into inches	...	...	...	0.3937
Feet into metres	...	...	...	0.3048
Metres into feet	...	...	...	3.2809
Yards into metres	...	...	...	0.9144
Metres into yards	...	...	...	1.0936
Lbs. per cubic foot to kgs. per cubic metre...				1602.00

	Divide by
Kgs. per cubic metre to lbs. per cubic foot ...	1602.00

1 metric ton = 1,000 kilogrammes = 2204.63 lbs.
 avoirdupois.

1 quintal = 100 kilogrammes.

COTTON BALE ENQUIRY.

(A) MEASUREMENT, WEIGHTS, AND DENSITY OF BALE.

		Overall Measurement of Bale	Gross Weight of bale	Net Weight of bale	Density of bale
1. Algeria	..	.. 120 × 80 × 50 cm.	250 kgs.	245 kgs.	510 kgs. per m. ³
2. Angola	..	.. 60 × 40 × 51 cm.	41½ kgs.	40 kgs.	335 kgs. per m. ³
(a)	..	.. 67 × 46 × 52 cm.	51½ kgs.	50 kgs.	320 kgs. per m. ³
(b)	..	.. 98 × 46 × 55 cm.	103½ kgs.	100 kgs.	415 kgs. per m. ³
(c)	..	.. 102 × 60 × 91 cm.	182/208 kgs.	175/200 kgs.	320/350 kgs. per m. ³
3. Argentina	..	.. 120 × 85 × 65 cm.	500 lbs.	485 lbs.	331 kgs. per m. ³
(a)	..	.. 124 × 69 × 95 cm.	220 kgs.	213 kgs.	300 kgs. per m. ³
(b)	..	.. 50 × 25 × 45 in.	511 lbs.	500 lbs.	17 lbs. per cu. ft.
4. Australia	..	.. 62 × 38 × 50 cm.	52 kgs.	50 kgs.	450 kgs. per m. ³
5. Belgian Congo	(a)	.. 98 × 50 × 50 cm.	100 kgs.	97 kgs.	415 kgs. per m. ³
(b)	..	.. 100 × 52 × 50 cm.	100 kgs.	97½ kgs.	390 kgs. per m. ³
(c)	..	..	..	..	..
6. Brazil :	..	..	..	..	..
(a) Pernambuco	..	.. 49 × 18 × 19½ in.	410 lbs.	400 lbs.	700 kgs. per m. ³
(b) Sao Paulo	..	.. 107 × 50 × 80 cm.	175 kgs.	172 kgs.	400 kgs. per m. ³
(c) Sao Paulo	..	.. 115 × 50 × 70 cm.	165 kgs.	162 kgs.	400 kgs. per m. ³
7. British West Indies :	..	..	..	..	..
(a) Barbados	..	.. 54 × 33 × 33 in. (average)	560 lbs.	550 lbs.	16 lbs. per cu. ft.
(b) Grenada	..	.. 39 × 27 × 33 in.	310 lbs.	300 lbs.	15 lbs. per cu. ft.
(c) St. Vincent	..	.. 39½ × 42 × 26½ in.	410 lbs.	400 lbs.	13½, 16 and 17 lbs. per cu. ft.
8. Bulgaria	..	.. 80 × 80 × 80 cm.	80 kgs.	79 kgs.	(average about 15) 15½ kgs. per m. ³
9. Burma	..	.. 36 × 19 × 19 in.	400 lbs.	390 lbs.	53 lbs. per cu. ft.

(A) MEASUREMENT, WEIGHTS, AND DENSITY OF BALE.

		Overall Measurement of Bale	Gross Weight of bale	Net Weight of bale	Density of bale
10. China (a) (b)	.. ..	19 × 29 × 33 in. 19 × 29 × 33 in.	512 lbs. 531 lbs.	500 lbs. 520 lbs.	47 lbs. per cu. ft. 52 lbs. per cu. ft.
11. Cyprus (a) (b)	.. ..	125 × 135 × 80 cm. 48 × 36 × 36 in.	400/450 lbs. 450 lbs.	390, 440 lbs. 443 lbs.	134 168 kilos, per per m. ³ 12 lbs. per cu. ft.
12. Ecuador	.. ..	26 cu. ft.	460 lbs.	454 lbs.	17½ lbs. per cu. ft.
13. Egypt (a) (b) (c)	.. .. .. .. .. ..	52 × 29½ × 24 in. 50½ × 31 × 22 in. 50½ × 31 × 22 in.	755 lbs. 752½ lbs. 752½ lbs.	733 lbs. 730½ lbs. 730½ lbs.	34½ lbs. per cu. ft. Cotton only 36½ lbs. per cu. ft. Cotton only 36½ lbs. per cu. ft.
14. Eritrea	.. ..	100 × 70 × 70 cm.	150 kgs.	141 kgs.	289 kgs. per m. ³
15. Fiji	.. ..	48 × 30 × 30 in.	311½ lbs.	300 lbs.	12 lbs. per cu. ft.
16. French Africa including (a) Morocco, Algeria, Senegal, Soudan, Guinea, Dahomey and Togo (b) French Congo (c) French Equatorial Africa	.. .. .. .. .. .. .. ..	135 × 65 × 60 cm. 100 × 52 × 50 cm. —	235 kgs. 100 kgs. 52 kgs.	228 kgs. 97½ kgs. 50 kgs.	500 kgs. per m. ³ 390 kgs. per m. ³ 300 kgs. per m. ³
17. Gold Coast	.. ..	There is only a small annual export of some 70 tons or so of seed cotton into the neighbouring French Mandated area of Togoland. The seed cotton is neither ginned nor baled in this colony, and is exported overland. There is no export tax.			
18. Greece (a) (b) (c) (d)	.. .. .. .. .. .. .. ..	120 × 90 × 70 cm. 27 × 52 × 37 in. 120 × 75 × 110 cm. 100 × 68 × 60 cm.	540/620 lbs. 559 lbs. 565 lbs. 450 lbs.	530/610 lbs. 550 lbs. 557 lbs. 440 lbs.	343 kgs. per m. ³ 19 lbs. per cu. ft. 19 lbs. per cu. ft. 30 lbs. per cu. ft.

19. Haiti	(a)	80 × 115 × 150 cm.	550 lbs.	540 lbs.	178 kgs. per m. ³
	(b)	21 × 32 × 56 in.	580 lbs.	569 lbs.	26 lbs. per cu. ft.
	(c)	56 × 45 × 6 in.	425 lbs.	413 lbs.	10/11 lbs. per cu. ft.
20. India	(a) Hodgart Press ..	51½ × 20½ × 18½ in.	} 400 lbs.	392 lbs.	40 lbs. per cu. ft.
	(b) Nasmyth " ..	48 × 16 × 18½ in.			
	(c) Cummins " ..	49 × 18½ × 18½ in.			
	(d) Nasmyth-Whitefield Press ..	36 × 30 × 15 in.		490 lbs.	50 and sometimes even 55 lbs. per cu. ft.
	(e) Cummins Press ..	44 × 19 × 19 in.	500 lbs.		
	(f)	49½ × 22½ × 17½ in.	369/509 lbs.	360/500 lbs.	45/36 lbs. per cu. ft.
	(g)	48 × 18 × 15 in.	400 lbs.	392 lbs.	36 lbs. per cu. ft.
	(h)	49 × 19 × 17 in.	400 lbs.	393½ lbs.	40 lbs. per cu. ft.
	(i) Punjab and Sind ..	48 × 16 × 22 to 24 in.	Saw ginned 391 lbs.	Saw ginned, 338 lbs.	Saw ginned 35/36 lbs. per cu. ft.
			Roller ginned 408 lbs.	Roller ginned 400 lbs.	Roller ginned 36/42 lbs. per cu. ft.
21. Iran	(a)	102 × 68 × 136 cm.	500 lbs.	488 lbs.	15 lbs. per cu. ft.
	(b)	baling not uniform	75, 165 kgs.	—	—
22. Iraq	(a)	40 × 26 × 24 in.	413 lbs.	400 lbs.	28 lbs. per cu. ft. (average for the country probably below 25 lbs. per cu. ft.)
	(b)	40 × 26 × 24 in.	439-418 lbs.	429-413 lbs.	28/29½ lbs. per cu. ft.
23. Italy	(Sicily)	140 × 84 × 85 cm.	175 kgs.	171 kgs.	175 kgs. per m. ³
24. Italian Somaliland	.. .. .	144 × 62 × 91 cm.	223 kgs.	218-1 kgs.	274-63 kg's per m. ³
25. Ivory Coast	.. .. .	135 × 70 × 60 cm.	240 kgs.	233 kgs.	425 kgs. per m. ³
26. Java	.. .. .	73 × 72 × 86 cm.	{ 206 kgs. Burlap 205-8 kgs. Mat }	200 kgs.	442 kgs. per m. ³
27. Kenya	(a)	41 × 27 × 27 in.		400 lbs.	23/25½ lbs. per cu. ft.
	(b)	27 × 24 × 42 in.	410 lbs.		
28. Korea	.. .. .	24 × 17 × 49 in.	400 lbs.	392 lbs.	34 lbs. per cu. ft.

(A) MEASUREMENT, WEIGHTS, AND DENSITY OF BALES.

		Overall Measurement of Bale	Gross Weight of bale	Net Weight of bale	Density of bale
29. Malta ..	..	Cotton in bags instead of bales, <i>Not</i> standard 17 ft. × 14½ ft.	140 kgs.	136 kgs. or less	
30. Mexico (a) (b) (c)	.. .. ..	28 × 42 × 56 in. 28 × 27 × 56 in. 22 × 22 × 56 in.	500 lbs.	494 lbs.	{ 35 lbs. per cu. ft. or 560 kilos. per m. ³ for export. Domestic 22½ lbs. per cu. ft.
31. Mozambique ..	..	54 × 40 × 28 in.			
32. Nigeria (a) (b) (c) (d) (e)	.. .. .. .. ..	40 × 26 × 26½ in. Northern 40 × 26 × 26½ in. Southern 40 × 26 × 26½ in. Lokoja 40 × 26 × 23/26 in. Northern 40 × 26 × 23/25 in. Southern	414 lbs. 411 lbs. 411 lbs. 429 lbs. 411 lbs.	400 lbs. 400 lbs. 400 lbs. 415 lbs. 400 lbs.	17 lbs. per cu. ft. 25 lbs. per cu. ft. 25 lbs. per cu. ft. 25 lbs. per cu. ft. 28 lbs. per cu. ft.
33. Nyasaland (a) (b) (c) (d)	.. .. .. ..	54 × 22 × 21 in. 40 × 27 × 25 in. 16 cub. ft. 40 × 26 × 23/25 in.	459 lbs. 431 lbs. 436 lbs. 430 lbs.	448 lbs. 417 lbs. 421 lbs. 416 lbs.	30 lbs. per cu. ft. 26 lbs. per cu. ft. 25 lbs. per cu. ft. 28 lbs. per cu. ft.
34. Paraguay ..	..	102 × 68 × 58 cm.	205/220 kgs.	199/215 kgs.	413/447 kgs. per m. ³
35. Peru (a) (b)	.. ..	56 × 28 × 43 in. 54½ × 44½ × 28½ in.	480 lbs. 610 lbs.	471/473 lbs. 601/603 lbs.	15/19 lbs. per cu. ft. 13½ lbs. per cu. ft.
36. Puerto Rico ..	..	34 × 30 × 60 in.	500 lbs.	485 lbs.	14 lbs. per cu. ft.
37. Ruanda Urundi ..	..	37 × 61 × 54 cm.	51·6 kgs.	50·3 kgs.	422 kgs. per m. ³
38. Salvador ..	..	56 × 27 × 40 in.	525 lbs.	512 lbs.	14½ lbs. per cu. ft.

39.	Siam (a) (b)	.. ..	.. ..	$41\frac{1}{2} \times 26 \times 25\frac{1}{2}$ in. 18 cu. ft. for bales for Singapore	400 lbs.	about 390 lbs.	28 lbs. per cu. ft.
		..	..	20 cu. ft. for bales for Japan 19 cu. ft. for bales for Europe	400 lbs.	390 lbs.	$\begin{cases} 19.5 \text{ lbs. per cu. ft.} \\ 21.6 \text{ lbs. per cu. ft.} \\ 20.5 \text{ lbs. per cu. ft.} \end{cases}$
40.	Sudan (a) (b) (c)	.. .. ..	.. .. ..	$41 \times 28 \times 28$ in. Whole bale fully pressed. $41 \times 28 \times 21$ in. Half bale fully pressed. $41 \times 28 \times 28$ in.	435 lbs. 255 lbs.	423½ lbs. 245 lbs.	418 kgs. per m. ³ 280 kgs. per m. ³
	(d) (e)	.. ..	.. ..	Whole bale half pressed M.W. $32 \times 21 \times 21$ in. $37 \times 29 \times 52$ in.	200 lbs. 250 lbs.	190 lbs. 241 lbs.	245 kgs. per m. ³ 370 kgs. per m. ³
	(f)	..	..	Whole bale fully pressed $40 \times 26 \times 22/26$ (Gezira)	605 lbs. 450 lbs.	661 lbs. 436 lbs.	20 lbs. per cu. ft. 28 lbs. per cu. ft.
41.	Swaziland	..	..	— — —	500 lbs.	483 lbs.	Low density
42.	Syria (Aleppo)	..	..	$54 \times 35 \times 28$ in.	250 lbs.	241 lbs.	About 8 lbs. per cu. ft.
43.	Tanganyika Territory	..	..	$41 \times 28 \times 25$ in.	412 lbs.	400 lbs.	25 lbs. per cu. ft.
44.	Turkey	..	..	1 metre in each direction	200/220 kgs.	196/216 kgs.	210 kgs. per m. ³
45.	Uganda (a) (b)	.. ..	.. ..	$41 \times 27 \times 25$ in. $40 \times 26 \times 22/26$ in.	410/415 lbs. 413 lbs.	400 lbs. 403 lbs.	25 lbs. per cu. ft. 28 lbs. per cu. ft.
46.	U.S.A. (a) (b)	.. ..	.. ..	$27 \times 20 \times 60$ (Square) 36×22 in. dia. (Round)	515 lbs. 250 lbs.	490 lbs. 247½ lbs.	35 lbs. per cu. ft. 32 lbs. per cu. ft.
47.	U.S.S.R.	..	..	$100 \times 61 \times 71$ cm.	180 kgs.	177 kgs.	41 kgs. per m. ³
48.	Yugo-Slavia	..	..	Length 150 cm. Perimeter (oval) 200 cm.	50/80 kgs.	45, 75 kgs.	25/40 kgs. per m. ³

(B) BALE COVERING.

		Type of Covering	Weight per Yard or per metre	Weight per Bale	Yards or metres per Bale
1. Algeria	..	..	Not available	5/8 kgs.	Not available
2. Angola	..	Jute open mesh	0.30 kgs. per m.	0.36 kgs.	1.20 metres
(a)	..	Jute close mesh	0.38 kgs. "	0.58 kgs.	1.50 "
(b)	..	" "	0.38 kgs. "	0.70 kgs.	1.85 "
(c)	..	" "	0.35 kgs. "	1.40 kgs.	4.00 "
(d)	..	" "			
3. Argentina	..	" "	10 ozs. per m.	2½ lbs.	3¾/4 m.
(a)	..	" "	9/10 ozs. " yard	43 ozs.	4¾ yds.
(b)	..	" "			
4. Australia	..	Jute close mesh (hessian)	14 ozs.	6 lbs.	6 yds.
	..	14 ozs.	72 in. wide per yard		
5. Belgian Congo	..	Jute (hessian)	0.335 kgs. per m. ²	0.40 kgs.	52 in. × 1 m.
(a)	..	ditto	ditto	0.65 kgs.	67 in. × 1 m. 10
(b)	..	Jute close mesh	0.330 kgs. per yd. ²	0.825 kgs.	2½ yds.
(c)	..				
6. Brazil :					
(a) Pernambuco	..	Jute open mesh	.66 lbs.	2 lbs.	3 yds.
(b) Sao Paulo	..	Usually jute, sometimes cotton ; close mesh	175 grs.	700 grs.	4 yds.
(c) "	..	Jute close mesh	170 grs.	700 grs.	4 m.
7. British West Indies :					
Barbados	..	Jute close mesh	10.3 ozs.	(approx.) 4 lbs. 10 ozs.	7½ yds.
Grenada	..	" "	1 lb. per yd.	7½ lbs.	7½ yds.
St. Vincent	..	" "	5.6 ozs. per yd.	2 lbs. 14 ozs.	8 yds. 24 in. wide
8. Bulgaria	..	..	No covering is used as locally grown cotton is not destined for export—it is distributed to local spinnners for consumption.	to 3 lbs. 4 ozs.	
9. Burma	..	Jute close mesh	½ lb. per yd.	9, 10 lbs.	2½ yds. (cut up centre and used in 2 pieces
10. China (a)	..	Jute hessian, 50 in. wide	10 ozs. per yd.	1 lb. 14 ozs.	3 yds.
(b)	..	close mesh	"	1½ lbs.	4 yds.

11. Cyprus ..	..	Jute close mesh	1 lb.	5 lbs.	9/10 yds.
12. Ecuador ..	..	Jute close mesh	9 ozs.	5 lbs.	5½ yds.
13. Egypt (a) ..	..	Jute	1 lb. per sq. yd.	4 lbs.	7½ sq. yds.
(b) ..	..	Jute	0.38 lbs.	4 lbs.	10½ sq. yds.
(c) ..	..	Jute	about ¾ lb.	4 lbs.	about 5½ yds.
14. Eritrea ..	..	Jute hessian, and palm leaves	1.30 kgs. per m.	9 kgs.	3.75 m.
15. Fiji ..	..	Jute standard size, loose top woolpack	—	11½ lbs.	—
16. French Africa ..	..	Jute hessian	.49 kgs. per sq. m.	3.5 kgs.	5 m.
(a) French Congo ..	..	Jute close mesh	330 grams per yd.	825 grams	2½ yds.
(b) French Equatorial Africa	..	Jute	—	1.6 kgs.	—
17. Gold Coast ..	..	—	—	—	—
18. Greece (a) ..	..	Jute or hemp	14 ozs.	5 lbs. 11 ozs.	6½ yds.
(b) ..	..	Jute	1 lb.	6 lbs.	6 yds.
(c) ..	..	Jute (8 oz. hessian 36 in. wide)	11.5 ozs.	5 lbs.	7 yds.
19. Haiti (a) ..	..	Jute open mesh	About 1 lb. of 500 grs.	About 10 lbs. of 500 grs.	10/11 yds.
(b) ..	..	Jute open mesh	With jute bags	5 kgs. H.D. bale	6 yds. H.D. bale
(c) ..	..	Old flour bags about 6 per bale	9 ozs. per sq. yd.	6 kgs. "pillow" bale (including bands and ropes)	11/12 yds. "pillow"
20. India (a) ..	..	Jute hessian, open mesh	Standard 8 and 10 ozs.	From 24 to 30 ozs.	2½ yds. of 50 in. wide
(b) ..	..	"	Sometimes 7½ ozs.	"	2.3 yds. of 40 in. wide.
(c) ..	..	"	"	"	3½ yds. 40 in. wide
(d) ..	..	"	"	"	3½ yds. 36 in. wide
(e) ..	..	"	"	"	3½ yds. 40 in. wide
(f) ..	..	Jute hessian close mesh	10 ozs. per yd. sides	1½ lbs.	2½ yds.
(g) ..	..	Jute hessian open mesh	8 ozs. per yd. ends	2½ lbs	2½ yds.
(h) ..	..	Jute hessian open mesh	10 ozs. per yd.	20 ozs.	8 ft.
(i) Punjab and Sind	..	Close mesh, jute hessian	10 ozs. 40 in. wide	About 3 lbs.	About 4 yds. 40 in wide

(B) BALE COVERING.

	Type of Covering	Weight per Yard or per metre	Weight per Bale	Yards per Bale
21. Iran (a) ..	Jute close mesh	1.3 lbs. per sq. yd.	8 lbs.	6 yds.
(b) ..	Jute covering	300 grams per m.	1,250 grams per bale	4 yds.
22. Iraq (a) ..	Jute hessian close mesh	12 ozs.	3 lbs.	4 yds.
(b) ..	Jute hessian close mesh	12 ozs.	3 3/4 lbs.	4 1/4 yds.
23. Italy (Sicily) ..	Jute	—	—	—
24. Italian Somaliland ..	Jute close mesh	276 grams per sq. yd.	2.1 kgs.	7.5 × .61
25. Ivory Coast ..	Jute close mesh	.49 kgs. per m. ²	3.50 kgs.	5 m.
26. Java ..	Jute or mat packing	.61 kgs. per m. .57 kgs. per mat	Burlap 4.6 kgs. Mat. 4 kgs.	Burlap 7 1/4 m. × 1 m. Mat. 7 mats 1.20 m. × 85 cm.
27. Kenya ..	Jute hessian	0.7 lbs.	2.8 lbs. (Coast Province 2.75 lbs.)	4 yds. 3 in. (Coast Province 4 yds.)
28. Korea ..	Hessian cloth, close mesh	—	2 lbs.	1.8 sq. yds.
29. Malta ..	Jute close mesh	Variable	4 kgs.	—
30. Mexico ..	Jute and hemp, close mesh	800 grams per m.	9 lbs.	5 yds.
31. Mozambique ..	Hessian cloth	—	4 1/4 lbs.	7 yds.
32. Nigeria :				
Northern, Southern and Lokoja	Jute close mesh	1 lb.	3 lbs.	4 yds.
" "	Jute hessian, close mesh	13 ozs. 48 in. wide	3 1/4 lbs.	4 yds.
33. Nyasaland (a) ..	Jute, close mesh	12 ozs.	3 lbs.	4 yds.
(b) ..	Hessian, close mesh	10 1/2 ozs.	3 lbs.	4 yds.
(c) ..	Jute hessian	14 ozs.	5 lbs.	3 1/4 yds.
(d) ..	Jute hessian, close mesh	13 ozs. 50 in. wide	3 1/4 lbs.	4 yds.
34. Paraguay ..	Jute, fairly close mesh	281 grams per yard	1 kg.	3 yds.

35.	Peru (a) .. (b) ..	.. ..	.. ..	Jute Jute, close mesh	8 ozs. per yard 8 ozs. " "	3½ lbs. 68 ozs.	7 yds. 8½/8½ yds.
36.	Puerto Rico	..	..	Jute, close mesh	—	10 lbs.	—
37.	Ruanda Urundi	..	..	" "	142·87 grams	490 grams	2·5 m. 50 cm. wide
38.	Salvador	..	..	" "	10 ozs.	4 lbs.	6 yds. 18 in.
39.	Siam (a) .. (b) ..	.. ..	.. ..	" " "	— —	4 lbs.	6½ yds. 3½ yds. 44 in. width
40.	Sudan :			Jute			
	(a) Whole bale, fully pressed	..	..	Jute	·63 lbs, 40 in. wide and ·47 lbs, 30 in. wide	11½ to 12 lbs.	4·8 yds.
	(b) Half bale, fully pressed	..	..	" "	" "	10 and 11 lbs.	4 yds.
	(c) Whole bale, half pressed	..	..	" "	" "	10 "	5·08 yds.
	(d) M.W.	..	..	" "	" "	9 "	—
	(e) Whole bale, fully pressed	..	..	" "	—	14 "	9 ft. × 4 ft. 8 in.
	(f) Gezira	..	..	Jute, close mesh Very good quality close mesh jute hessian	11 ozs. 40 in. wide	2½/3 lbs.	98 in. of 40 in. wide and 62 in. of 30 in. wide
41.	Swaziland	..	..	Hessian	8 ozs.	17 lbs. including bands	—
42.	Syria (Aleppo)	..	..	Old jute sacks	—	8 lbs.	—
43.	Tanganyika Territory	..	..	Jute hessian, close mesh	11 ozs.	¾ lbs.	5/6 yds.
44.	Turkey	..	..	Jute hessian cloth	0·32 kgs. per m.	1·2 kgs.	3·70 m.
45.	Uganda (a) (b)	.. ..	.. ..	Jute hessian Close mesh jute hessian	11 ozs. 10 ozs. 40 in. wide	2½ lbs. 3 lbs.	4 yds. About 5 yds.
46.	U.S.A. :						
	(a) Square	..	..	Jute, open and close mesh	2 lbs.	12 lbs. plus patches	6 yds.
	(b) Round	..	..	Jute, close mesh	14 ozs.	2½ lbs.	3 yds.
47.	U.S.S.R.	..	..	Jute, hemp	—	1 kg.	5·5 sq. m.
48.	Yugo-Slavia	..	..	Hemp sacks	—	5 kgs.	—

(C) BANDS, TIES AND WIRES.

	Bale Weight	No. of bands or wires per bale	Dimensions of bands or wires	Total weight of bands on bale	How band fastened
1. Algeria	6	3 cm. wide	3 kgs.	Studs or "agrafes"
2. Angola (a)	5	19 × 0.6 mm.	0.84 kgs.	Not available
(b)	5	19 × 0.6 mm.	0.92 kgs.	"
(c)	7	20 × 1 mm.	2.80 kgs.	"
(d)	7	22 × 1.5 mm.	6.60 kgs.	"
3. Argentina (a)	8-11	7 in. wide	9-10 lbs. 11 lbs.	Buckles
(b)	H.D. 9 6-8	18 Birmingham gauge 2.80-3.00 m.		Buckles
4. Australia..	..	7 wires	No. 8 gauge wire	5 lbs.	By special knot
5. Belgian Congo (a)	5 bands	1.60 m.	1.5 kgs.	Buckles
(b)	7 "	1.80 m.	2.3 kgs.	"
(c)	8 "	2 m.	1.600 kgs.	Signode steel clasp
6. Brazil :					
(a) Pernambuco	..	15 bands	29 ft. 6 in. × 1 in. × 22 BG	8 lbs.	Tucked in
(b) Sao Paulo	..	7-10	280 cm. × 2 cm.	3 kgs.	Usually buckles, sometimes twisted
(c) " "	..	8	2.4 m.	2.1 kgs.	Buckles
7. British West Indies :					
Barbados	6 mild steel bands	10 ft. 1 in. × 1 in.	5 lbs. 10 ozs.	Buckles
Grenada	3 sisal ropes	1 in. diam. × 3 1/2 yds.	2 1/4 lbs.	Tied
St. Vincent	4 bands	10 ft. × 1 in.	5 lbs. 8 ozs.	Rivets
8. Bulgaria	2-4 galvanised iron wire ties	3 mm. gauge	800-1,000 grs.	Twisted

9. Burma	2 bands	$\frac{3}{4}$ in. \times 28 ft. \times 17 gauge	8 lbs.	Tucked in
10. China (a)	6 hoops	$\frac{3}{4}$ in. \times 31 ft. 6 in. \times 20 B.G.	10 lbs.	Tucked in
(b)	3 hoops	" "	9 $\frac{1}{2}$ lbs.	"
11. Cyprus	4 wires per bale Two more replies confirm this information	3-30 m. each wire	2 lbs.	Twisted
12. Ecuador	5 No. 13 wire bands	4 yds.	6 lbs.	Twisted wire
13. Egypt (a)	11 bands	8 ft. \times 1 $\frac{1}{4}$ in. \times 18 B.W.G.	18 lbs.	Studs
(b)	11 hoops	8 ft. \times 1 $\frac{1}{8}$ in. \times 18 B.G.	18 lbs. including studs	Studs
(c)	11 hoops	" "	" "	"
14. Eritrea	5 hoops	13-7 m. \times 2 $\frac{1}{4}$ cm.	3-5 kgs.	With rings
15. Fiji	Nil	—	—	—
16. French Africa	6 steel hoops	30 mm. \times 0-8 mm.	3-5 kgs.	Buckles
(a) French Congo	8 bands	2 m.	1-6 kgs.	Tucked in
(b) French Equatorial Africa	3 bands	—	—	Buckles
17. Gold Coast	—	—	—	—
18. Greece (a)	5 wires	Wire No. 11	10 lbs.	Twisted
(b)	6 wires	8 ft.	3 lbs.	"
(c)	Some 5, some 7 wires	4 m.	3 $\frac{1}{4}$ lbs.	Twisted
19. Haiti	6 H.D. 6 steel bands	550 cm. H.D. bands 8 ft. 6 in.	7-2 lbs. of 500 grs. H.D. 6 bands. 7 $\frac{1}{4}$ lbs.	Twisted H.D. buckles
	"Pillow" bales 6/8 ropes	"Pillow" ropes 10 ft. long	"Pillow" ropes, 7, 8 lbs.	Ropes are tied

(C) BANDS, TIES AND WIRES.

	Bale Weight	No. of bands or wires per bale	Dimensions of bands or wires	Total weight of bands on bale	How band fastened
20. India (a to e)	400 lbs.	Usually 3 steel hoops 24 ft. \times $\frac{3}{4}$ in. \times 20 G. Sometimes either 2 hoops, each 34 ft. \times $\frac{3}{4}$ in. \times 20 G. or 1 hoop of 53 ft. \times $\frac{3}{4}$ in. \times 18 G. are used.	(a) In cases where 2 hoops each of 29 $\frac{1}{2}$ ft. \times $\frac{3}{4}$ in. \times 19 G. and one hoop of 23 $\frac{1}{2}$ ft. \times $\frac{3}{4}$ in. \times 19 G. are used for a bale of 500 lbs., the total weight comes to about 9.15 lbs. per bale.		
	500 lbs.	Either 2 hoops, each 29 $\frac{1}{2}$ ft. \times $\frac{3}{4}$ in. \times 19 G. and 1 hoop, 23 $\frac{1}{2}$ ft. \times $\frac{3}{4}$ in. \times 19 G. or 1 hoop only, 62 $\frac{1}{2}$ ft. \times $\frac{3}{4}$ in. \times 19 G. are used	(b) In cases where 1 hoop of 62 $\frac{1}{2}$ ft. \times $\frac{3}{4}$ in. \times 18 G. is used for a bale of 511 lbs., the weight is about 7.5 lbs. per bale		Tucked in
			(c) In the case of 400-lb. bales, the weight of hoops per bale varies from 7/7 $\frac{1}{2}$ lbs. per bale, according to hoops used.		
(f)	..	Generally 3 hoops, although some have 2 and some 4	24 ft. \times $\frac{3}{4}$ in.	6 $\frac{1}{2}$ lbs.	Tucked in
(g)	..	3 bands	Standard 2 ft. long \times $\frac{3}{4}$ in. wide \times 20 B.S.G.	6 $\frac{1}{2}$ lbs.	Tucked in
(h)	..	3 bands	18 ft. \times $\frac{3}{4}$ in. \times 21 G.	5 lbs. 4 ozs.	Tucked in
(i) (Punjab and Sind)	..	3 steel hoops	$\frac{3}{4}$ in. \times 20 G. \times 24 ft.	5 $\frac{1}{2}$ /6 lbs.	Ends tucked in
21. Iran (a)	..	8 wires	3.2 m. \times 3.5 mm.	4 lbs.	Wires joined by buckles, sometimes twisted
(b)	..	5 wires	—	1,300 grams per bale	Twisted

22. Iraq (a)	7 hoops	7 ft. 8½ in. × 1½ in.	10 lbs.	Rivets
(b)	7 hoops	" "	7/10 lbs.	Rivets
23. Italy (Sicily)	5 ropes	—	10 kgs.	Knotted
24. Italian Somaliland	6 bands	285 × 2 × 0.1 cm.	2.8 kgs.	Buckles
25. Ivory Coast	6	30 × 80 mm.	1 kg.	Buckles
26. Java	3 bands	3.09 m. long	1.6 kgs.	Buckles
27. Kenya	7 hoops	92 × 1 in.	7 lbs.	Studs, 2 per hoop
28. Korea	3 bands	—	6 lbs.	Tucked in
29. Malta	None	—	—	—
30. Mexico	Domestic 6 bands. Export 8/10 bands	9 ft.	7 lbs.	Buckles
31. Mozambique	6	11½ ft. × 1 in.	6½ lbs.	Buckles
32. Nigeria :	7 bands	7 ft. 8 in. × 1½ in. × 18 G.	11 lbs.	Studs 2 per band
Southern and Lokoja	7 bands	7 ft. 8 in. × 1 in. × 19 G.	8 lbs.	" "
Northern	7 steel hoops	1½ in. × 18 G. × 7 ft. 8 in.	10½ lbs.	By studs
Southern	7 steel hoops	1 in. × 19 G. × 7 ft. 8 in.	7/7½ lbs.	"
33. Nyasaland (a)	9 bands	9 ft. × ¾ in.	8 lbs.	Tucked in
(b)	7 bands	7 ft. 8 in. × 1½ in. × 18 B.G.	11 lbs.	Studs
(c)	7 bands	1½ in. × 18 G.	9 lbs.	"
(d)	7 steel hoops	1½ in. × 18 G. × 7 ft. 8 in.	10½ lbs.	"
34. Paraguay	8 bands	2.30 m.	5 kgs.	Buckles
35. Peru (a)	6 wires	9 ft. 6 in.	3½ lbs.	Hooks
(b)	6 wires	10 G. wire used, each wire 10 ft. long	2½ lbs.	See remarks

	Bale Weight	No. of bands or wires per bale	Dimensions of bands or wires	Total weight of bands on bale	How band fastened
36. Puerto Rico 3 bands	72 in.	5 lbs.	Rivets
37. Ruanda Urundi 5 steel hoops (2 hot drawn, 3 cold drawn)	2 hot drawn 1.88 × 20 × 1 mm. 3 cold drawn 1.79 × 19 × .6 mm.	Formerly 1.10 kgs. now .810 kgs.	Buckles and studs
38. Salvador 6 bands	3 yds. 18 in. × $\frac{3}{8}$ in.	9 lbs.	Buckles
39. Siam (a) (b) 5 bands .. 5 bands	? × 1 × $\frac{3}{8}$ in. 6 ft. × $\frac{3}{4}$ in.	6 lbs. 6 lbs.	Rivets Rivets
40. Sudan (a).. (b) (c) (d) (e) (f) 7 and 8 hoops .. 7 and 8 hoops .. 5 hoops .. 6 hoops, M.W. .. 8 hoops .. 8 steel hoops	1 in. × 18 W.G. " " $\frac{7}{8}$ in. 1 in. × 18 G. heavy × 7 ft. 8 in. long	4.15 kgs. 3.28 kgs. 2.78 kgs. — — 11½ lbs.	Loose studs " " Rivets Studs
41. Swaziland 6 bands	$\frac{3}{4}$ in.	—	Buckles
42. Syria (Aleppo) 5 ties* of iron wire	10 ft. × 2 mm.	1 lb.	Twisted
43. Tanganyika Territory 7/8 bands	90 in. × 1 in. × 19 G.	7/8 lbs.	Rivets
44. Turkey 9 bands	17 mm.	3.30 kgs.	Buckles
45. Uganda 7 bands	90 in. × lin. strength 40 tons per sq. in.	7 lbs.	Studs
 7 steel hoops	1 in. × 20 G. × 7 ft. 6 in.	7 lbs.	Studs
46. U.S.A. (Square) 9 bands	$\frac{3}{8}$ in. × 19 B.W.G.	9 lbs.	Buckles
47. U.S.S.R. 7/8 wires	4 mm. dia.	2 kgs.	Twisted
48. Yugo-Slavia None	—	—	—

*Of which two are double.

(D) ADDITIONAL INFORMATION

	Is bale pressed for export at gin or elsewhere	If finally pressed elsewhere, how many interior bales go to make an export bale	Range of Staples	Length of Staple usually produced	Any ginnery or export taxes	Exports of last five seasons
1. Algeria	.. Roller ginned. Saw Ginned McCarthy gins	At the gin	Egyptian 38/42 mm. Durango 32, 34 mm.	32/34 mm.	None	1935. 1,702 quintals 1934. 1,377 " 1933. 1,567 " 1932. 2,289 " 1931. 5,733 " 1930. 13,626 "
2. Angola	.. Saw ginned	At gin	$\frac{3}{8}$ in 1936	$\frac{3}{8}$ in 1936	Export tax 1% <i>ad valorem</i>	1935. 668 metric tons 1934. 475 " 1933. 259 " 1932. 164 " 1931. 189 "
3. Argentina (a)	Saw	Until recently pressed at gin. This year one or two H.D. presses installed.	$\frac{7}{8}$ in. / $1\frac{1}{8}$ in.	1 in. / $1\frac{1}{8}$ in.	\$1 Argentine (1s/2d) at the gin per ton. Statistics tax. \$-0.3% Transactions tax. Controlled exchange is equal to a further tax of 11/12% <i>ad val.</i>	1935. 36,300 tons 1934. 27,112 " 1933. 20,564 " 1932. 28,272 " 1931. 25,018 "
(b)	Saw	At gin. Some H.D. presses being erected	$\frac{3}{8}$ in. to full 1 in., a little $1\frac{1}{8}$ to $1\frac{1}{2}$ in.	1 in. full	.03% for statistics	
4. Australia	.. Saw	At gin	$\frac{3}{8}$ / $1\frac{1}{8}$ in.	$1\frac{1}{8}$ in.	None	1935. 900 bales 1934. 5,353 " 1933. 826 " 1932. nil " 1931. 189 "

(D) ADDITIONAL INFORMATION

	Roller or Saw Ginned	Is bale pressed for export at gin or elsewhere	If finally pressed else- where, how many interior bales go to make an export bale	Range of Staples	Length of Staple usually produced	Any ginnery or export taxes	Exports of last five seasons
5. Belgian Congo:							
(a)	Saw	At gin	—	2 5/33 mm. Selection Stations 18/27 mm. Native cot- ton.	25 mm.	Cotton tax 6 cents per kg. of cotton lint. Export tax 5% <i>ad val.</i>	
(b)	Saw	At gin	—	3/4 in.	Full 3/8 in.	Customs duties -375 f. per kg. of lint. Cotton tax -06 f. per kg. of lint	1935. 23,516,995 kgs. 1934. 19,987,133 " 1933. 12,812,707 " 1932. 12,123,332 " 1931. 12,540,650 "
(c)	Saw	At gin	—	3 1/2 in. full	1 in.	—	
6. Brazil:							
(a) Pernambuco	Saw	Both	2 1/4 interior bales	24/36 mm.	26/32 mm.	Gin tax 30 reis per kg. seed cotton. Export tax 10% on official weekly valuation	Pernambuco. State only 1935/6. 62,000 bales 1934/5. 82,684 " 1933/4. 43,165 " 1932/3. 17,175 " 1931/2. 50,623 " (drought)
(b) Sao Paulo	Saw	Pressed at gin, but re-pressed by a few ex- porters	—	26/30 mm.	28/29 mm.	10 reis per kg. to Minister of Agric. 1% of invoice amount duties (Government) 12 \$240 port taxes (loading, trans- port, etc.)	Whole Brazil 1936. 770,167 bales 1934. 703,039 " 1933. 81,071 " 1932. 2,964 " 1931. 115,439 "

(D) ADDITIONAL INFORMATION

		Is bale pressed for export at gin or elsewhere	If finally pressed else- where, how many interior bales go to make an export bale	Range of Staples	Length of Staple usually produced	Any ginnery or export taxes	Exports of last five seasons
9. Burma	.. Roller	At gin	—	$\frac{3}{8}$ 1 in.	$\frac{3}{8}$ in.	2 annas per 400lbs. of baled cotton. 6 pies per 100lbs. of unbaled cot- ton, both for do- mestic use and export	1934 '5. 80,760 400lb. bales 1933 '4. 117,520 " " 1932 '3. 75,901 " " 1931 '2. 29,094 " " 1930 '1. 83,557 " "
10. China (a)	.. Mainly hand ginned, re- mainder roller	Pressed by Press Packing Cos. in Shanghai, Hankow, etc.	Interior bales are of various weights	$\frac{1}{2}$ 1 $\frac{1}{8}$ in.	$\frac{3}{8}$ in.	Export tax of \$3.10 per 100 kilos, plus 10% surtax (1 Chinese \$ = 1s. 2 $\frac{1}{2}$ d.)	1935 '6. 161,965 531 lb. bales 1934 '5. 75,598 " " 1933 '4. 151,176 " " 1932 '3. 197,663 " " 1931 '2. 142,495 " "
(b)	.. Roller	Pressed for ex- port at port	Interior bales are of various weights	$\frac{3}{4}$ 1 $\frac{1}{8}$ in.	$\frac{7}{8}$ in.	Approximate 48 American points	
11. Cyprus (a)	.. Saw	At gin chiefly	3 '4 interior bales	$\frac{3}{4}$ 1 $\frac{1}{8}$ in.	1 in.	1s. per bale wharf- age dues	1935. 2,321 400lb. bales 1934. 2,763 " " 1933. 1,225 " " 1932. 2,964 " " 1931. 4,020 " "
(b)	.. 90% saw 10% roller	At gin	1 $\frac{1}{4}$ interior bales = 1 export bale	$\frac{3}{4}$ 1 $\frac{1}{8}$ in.	1 in.	Export tax 1s. per bale. Ginning tax $\frac{1}{4}$ d. per 10 lbs.	

12. Ecuador	.. Saw	At gin	—	$\frac{1}{8}$ / $\frac{1}{16}$ in.	1 in.	None	1935. 218 bales. Nothing previously.
13. Egypt (a)	.. Roller	Almost entirely all pressed elsewhere	Interior bale a little heavier than e x p o r t bales. About 5/6	$1\frac{1}{8}$ in.	$1\frac{1}{8}$ in.	No ginning taxes. Export tax of 10 piastres per can- tar gross weight	1935. 1,063,355 bales 1934. 1,212,454 " 1933. 862,095 " 1932. 981,953 " 1931. 986,106 "
(b)	Roller	All but $\frac{1}{2}\%$ is finally pressed at Alexandria	Interior bales vary consid- erably in weight, but are on the average about 100 lbs. heavier than e x p o r t bales	$1\frac{1}{8}$ in.	$1\frac{1}{8}$ in. = 65° Over $1\frac{1}{8}$ in. = 33°	No ginning tax. Customs 20 pias- tres per 100 kgs. Quay dues 2 pias- tres per 100 kgs. Municipality $\frac{1}{2}\%$ on Monthly Cus- toms Estimate	1935. 6. 1,101,681 bales 1934/5. 1,064,932 " 1933/4. 1,214,932 " 1932/3. 862,095 " 1931/2. 981,953 "
(c)	.. Roller	Ditto	Ditto	$1\frac{1}{8}$ in. (Ash- mouni) $1\frac{1}{8}$ in. (Maarad, Sakha 4, Giza 26)	$1\frac{1}{8}$ in. Ashmouni	Ditto	Ditto
14. Eritrea	.. Roller	At gin	—	32-56 mm.	40, 48 mm.	—	1935. 1,041.00 q. li. 1934. 2,654.40 " 1933. 1,009.72 " 1932. 1,657.39 " 1931. 1,430.00 "
15. Fiji	.. Single roller	At gin	—	$1\frac{1}{8}$ 2 in.	$1\frac{1}{8}$ in. Sea Island. $1\frac{1}{8}$ in. Back- cross 172.	1% Port and Cus- toms tax 6d. per ton wharfrage	1935. 36 bales 1934. — 1933. 102 " 1932. 277 " 1931. 215 "

(D) ADDITIONAL INFORMATION

	Is bale pressed for export at gin or elsewhere	Roller or Saw Ginned	If finally pressed else- where, how many interior bales go to make an export bale	Range of Staples	Length of Staple usually produced	Any ginnery or export taxes	Exports of last five seasons
16. French Africa, Morocco, Algeria, Senegal, Soudan, Guinea, Dahomey and Togo	At gin	In Morocco and Algeria, with Egyptian types, roller gins used. Elsewhere with American types, saw gins	—	25/28 mm.	26 mm.	Charge for ginning, pressing and ba- ling, 300 frs. per ton of 1,000 kgs.	1935. 4,553 tons 1934. 3,652 " 1933. 2,880 " 1932. 2,894 " 1931. 5,336 "
French Congo	At gin	Saw	—	$\frac{1}{8}$ 1 in. full	1 in.	—	1935. 9,500 bales 1934. 6,700 " 1933. 4,300 " 1932. 2,900 " 1931. 2,440 "
French Equato- rial Africa	At gin	Saw	—	$\frac{1}{8}$ 1 in.	—	Nil	1935. 62,209 m. quintals 1934. 50,770 " 1933. 23,709 " 1932. 15,700 " 1931. 9,531 "
17. Gold Coast	—	—	—	—	—	—	—
18. Greece(a)	At gin	Saw	—	24/30 mm.	25/26 mm.	None	1935. 3,646 bales 1934. 34 " 1933. 130 " 1932. Nil " 1931. 38 "
(b)	Bales not finally pressed else- where, and should be con- sidered as half pressed bales	Saw	—	$\frac{1}{8}$ 1 in.	$\frac{1}{8}$ in.	None	
..	At gin	Saw	—	$\frac{1}{8}$ 1 in.	$\frac{1}{8}$ 1 in.	None	

<i>1. Haiti (a)</i>	..	Saw	At gin	—	20/40 mm.	28/32 mm.	Govt. export tax \$0.2147 per 50 kgs.	1934/5. 6,177,551 kgs. 1933/4. 5,301,798 " 1932/3. 5,846,483 " 1931/2. 6,308,365 " 1930/1. 4,172,537 "
<i>(b)</i>	..	Saw	At gin	—	28/34 mm.	Average length 30/35 mm. Long fibre selected averages 40 m.m.	Export tax at Port au Prince .4192 U.S. cents per 100 kgs. Export tax in provinces .4294 U.S. cents per 100 kgs.	
20. India (a)	..	Roller ginned except in Punjab and Sind, where the cotton is either roller ginned or saw ginned according to the requirements of the consumer	The practice is either to gin and press cotton in the same compound or to gin in one factory and to press in another in the same town	The practice of making up first an inferior bale and then an export bale is not prevalent in India	From $\frac{1}{8}$ in. and $\frac{1}{4}$ in. to full 1 in.	About $\frac{3}{4}$ in.	There is no uniform or general tax levied on ginning. At some cotton ginning and pressing centres, a municipal tax of 1 to 2 annas per bale is levied. A cotton cess of 2 annas per bale is levied on all cotton exported to foreign countries, or consumed in any mill in British India. In the case of unbaled cotton of 6 pies per 100 lbs.	Year ending August 31st 1935. 3,117,587 bales " 1934. 3,252,781 " 1933. 2,783,823 " 1932. 1,606,739 " 1931. 3,728,265 "
<i>(b)</i>	..	Mainly roller	At press factories in the cotton growing districts	—	$\frac{3}{8}$ to $1\frac{1}{2}$ in.	$\frac{3}{8}$ in. and above		
<i>(c)</i>	..	Mostly roller	Generally at the gin	—	$\frac{1}{2}$ to 1 in.	$\frac{3}{8}$ in. and below		
(d) (Punjab and Sind)	..	Roller ginned with some saw ginning of improved varieties	At gin	—	—	$\frac{3}{8}$ in.	None	

26. Java (a)	..	Saw	Pressed finally in exporters godown in the java ports	Each interior bale weighs 100 kgs. net	—	—	Export taxes amounting to 6½ cents N.E.I. cur- rency per pecol of 136 lbs. net	1935. 1,458,039 kgs. 1934. 910,754 " 1933. 943,180 " 1932. 372,780 " 1931. 945,878 "
(b)	..	Saw and hand	—	—	20	26 mm.	21/22 mm.	None
27. Kenya	..	Roller	At gin	—	1 1½ in. Coast Province 3 1 in.	1 1½ in. C.P. 3 1 in.	Tax on ginned cot- ton of 2 cents. One shilling = 100 cents.	1935/6. 15,636 bales 1934/5. 8,773 " 1933/4. 6,749 " 1932/3. 4,276 " 1931/2. 1,735 "
28. Korea ..	..	Saw	At gin	—	1 1½ in.	3 1 in.	—	1935. 30,024,000 lbs. 1934. 19,659,600 " 1933. 18,453,700 " 1932. 11,230,266 " 1931. 10,303,300 "
29. Malta ..	..	Hand ginned by peasants at home	Bales for export hand and foot pressed at packing stores	—	—	—	None	1935. 860 cvts. 1934. 196 " 1933. 497 "
30. Mexico	..	Saw	Bales are high density com- pressed at the compress plant	—	1 1½ in.	1 in.	None	1935. 87,000 bales 1934. 43,000 "
31. Mozambique ..	..	Saw	At gin	—	1 1½ in.	1½ in.	—	1935. 127 bales 1934. 185 " 1933. 274 " 1932. 65 " 1931. 50 "

(D) ADDITIONAL INFORMATION

	Roller or Saw Ginned	Is bale pressed for export at gin or elsewhere	If finally pressed else- where, how many interior bales go to make an export bale	Range of Staples	Length of Staple usually produced	Any ginnery or export taxes	Exports of last five seasons
32. Nigeria (a)	.. Saw	At gin	—	1, 1½ in.	1½ in.	Harbour dues from Lagos only of 4s. per ton gross weight	1935. 53,290 bls } Northern, 1934. 24,870 " } including 1933. 23,502 " } Lokoja 1932. 4,993 " } and 1931. 14,918 " } Abirja 1935. 5,737 bls. 1934. 3,103 " 1933. 827 " 1932. 1,297 " 1931. 4,555 " } Southern
(b) North Saw		At gin	—	1½, 1½ in.	1½ in.	None	
(c) South Saw		At gin	—	1/1½ in.	1½ in.	None	
33. Nyasaland (a)	Saw	Bales pressed for export	—	1/1½ in.	1½ in.	None	
(b)	Mostly saw	At gin	—	1½ 1½ in.	1½ in.	Ginneries are licensed annually —fee £1	1935. 20,485 bales of 400 lbs. 1934. 10,368 " " 1933. 5,777 " " 1932. 5,097 " " 1931. 4,205 " "
(c)	Chiefly saw	At gin	—	—	Av. 1½ in.	Tax of 2d. per 100 lbs. on all seed cotton bought from Crown Land Growers	

34. Paraguay .. Saw

At gin	—	$\frac{7}{8}/1\frac{1}{2}$ in.	$\frac{11}{16}$ in.	None on ginning. Government re- quires exporters to sell 70% of proceeds in Ar- gentine paper money, at official rate of (1936) \$51 Paraguayan = \$1 Argentine and the exporter must deliver to the Banco Agrícola del Paraguay 250 kg. of seed for every tone of cot- ton lint exported	1935. 7,027,862 kgs. 1934. 7,952,564 " 1933. 2,708,202 " 1932. 2,818,170 " 1931. 2,745,911 "
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35. Peru (a)

.. Tanguis, saw
ginned, Pima,
roller

Tanguis	—	$1\frac{1}{4}/1\frac{1}{2}$ in.	Tanguis	These vary accord- ing to fluctuating	1935. 358,000 bales of 490 lbs.
$1\frac{1}{4}/1\frac{1}{2}$ in.		$1\frac{1}{4}$ in.	Pima	of the Liverpool	1934. 266,000 "
Pima		$1\frac{1}{2}$ in.	Cotton Market.	Cotton Market.	1933. 254,000 "
$1\frac{1}{4}/1\frac{1}{2}$ in.			This week's (Aug.	This week's (Aug.	1932. 216,000 "
			15, 1936) taxes	15, 1936) taxes	1931. 218,000 "
			are as follows:	are as follows:	
			Unemployed tax:	Unemployed tax:	
			0.53 centavos per	0.53 centavos per	
			quintal (46 kgs).	quintal (46 kgs).	
			Export Duty:	Export Duty:	
			15-pd. per qntl.	15-pd. per qntl.	
			National defence:	National defence:	
			18d. per quintal.	18d. per quintal.	
			Agricultural Soc:	Agricultural Soc:	
			10 centavos per	10 centavos per	
			qntl. (fixed rate).	qntl. (fixed rate).	

(D) ADDITIONAL INFORMATION

Peru (b)	Roller or Saw Ginned	Is bale pressed for export at gin or elsewhere	If finally pressed elsewhere, how many interior bales go to make an export bale	Range of Staples	Length of Staple usually produced	Any ginnery or export taxes	Exports of last five seasons
36. Puerto Rico	.. Saw and roller	At gin	—	T a n g u i s 1 3/4 in.	1 3/4 in. Tan- gus, 92% of crop. 1 3/4 in.	Ginning Tax of 18d. per 100 lbs. <i>Export Taxes</i> National Defence, 18d. per 100 lbs. Export Tax, 14d. per 100lbs. (Aver- age) Unemploy- ment Tax, 6d. per 100lbs. (Average) National Agra- rian Soc. 1.20d. per 100lbs. Local Port taxes, 3d. per 100lbs.	1935. 396,130 } 1934. 344,217 } 1933. 277,660 } 1932. 231,055 } 1931. 220,500 }
				1 3/4 in.	1 3/4 in.	None	1935. 113 bales 1934. Nil 1933. 580 " 1932. 2,323 " 1931. 3,390 "
				23.35 mm. Av. 1 1/2 in.	Allan long staple 31 32 mm.	Cotton tax: 0.06 frs. per kg. Ex- port tax, 5% <i>ad</i> <i>valorem</i> . Other taxes, 0.15 frs. per kg.	1936. 12,140 bales 1935. 10,361 " 1934. 9,520 " 1933. 10,502 " 1932. 5,217 " 1931. 3,198 "
				1 1 in.	1 in.	None	1935. Negligible 1934. 5,804 kgs. 1933. 41,599 " 1932. 7,864 "
37. Ruanda Urundi	.. Saw	At gin	—				
38. Salvador	.. Saw	At gin	—				

39. Siam (a)	..	Roller and saw	At gin	1½	¾/1 in.	¾/1 in.	None	1935. 1,000 bales 1934. 213 " 1933. 116 " 1932. 284 " 1931. 255 "
(b)	..	Roller	At gin	—	¾, 1 ⅞ in.	¾ in.	None	
40. Soudan (a)	..	Roller, except for certain types of rain grown cotton	At gin	—	Sakel 1 ½ in. and over. Irrigated Am. 1 ¼/1 ½ in. Rain grown 1 ⅞, 1 ¾ in.	—	—	1935. 839,282 kantars 1934. 616,383 kts., Egyptian 1933. 470,469 " American 1933. 72,485 " American 1932. 737,726 " Egyptian 1932. 113,578 " American 1931. 142,841 " American 1931. 57,583 " American
41. Swaziland	..	Saw	At gin	—	1 ¼ in. to full 1 ½ in.	Gd. 1 ½ in.	—	1935. 59 bales 1934. 74 " 1933. 59 " 1932. 101 " 1931. 444 " 1930. 621 "
42. Syria (Aleppo)		Roller. Only 3 saw gins in active use	At gin	—	¾ 1 ½ in.	1 in.	None	1935. 26,700 bales 1934. 10,300 " 1933. 3,400 " 1932. 9,300 "
43. Tanganyika Territory		Roller	At gin	—	1 ½ in. — Full 1 ½ in. (Universal standards)	Gd. 1 ½ in. (Un. Stan)	Export tax of ½ cent per lb. (Equal to .06d. per lb.)	1935. 55,888 bales of 400 lbs. 1934. 31,612 " 1933. 18,420 " 1932. 17,970 " 1931. 13,585 "
44. Turkey	..	Roller and saw. Platt's gins	In some cases the bale is pressed at the gin, in others elsewhere	Only one bale is made up. No interior bales	15 26 mm.	20 mm.	None	1935. 77,000 bales 1934. 66,000 " 1933. 25,000 " 1932. 53,000 " 1931. 113,000 "

(D) ADDITIONAL INFORMATION

	Roller or Saw Ginned	Is bale pressed for export at gin or elsewhere	If finally pressed else- where, how many interior bales go to make an export bale	Range of Staples	Length of Staple usually produced	Any ginnery or export taxes	Exports of last five seasons
45. Uganda (a)	.. Roller	At gin	—	26/32 mm.	29 mm.	Export tax of 2 cents per lb. lint (subject to amendments)	1935. 253,242 400lb. bls., net 1934. 285,642 " " 1933. 294,828 " " 1932. 207,326 " " 1931. 188,920 " "
(b)	.. Roller	At gin	—	1½/1 ⅝ in.	1 ⅞ in.	2 cents per lb. (i.e. 100 cents = 1s. English)	
46. U.S.A.	.. Saw	Square bale ; pressed for ex- port at port, not at gin. Round bale ; at gin	1	¾/1 ⅞ in.	¾/1 in.	None	1934/5. 4,816,000 running bls. 1933/4. 7,552,000 " 1932/3. 8,426,000 " 1931/2. 6,820,000 " 1930/1. 6,697,000 " counting round bales as half bales
47. U.S.S.R.	.. Up to and inclu- sive of 35 mm. cotton is saw ginned ; up- wards of 35 mm. is roller ginned	At gin	—	Amer. Seed : 23/24 to 32/34 mm. Egypn. Seed : 33/35 to 50/52 mm.	30/32 mm.	—	1933. 588 tons 1932. 17,800 " 1931. 40,180 "
48. Yugo-Slavia	.. Both roller and saw gins are used	Cotton is not pressed	—	15/30 mm.	20/25 mm.	None	No cotton exported

COTTON BALE ENQUIRY—*continued*

REMARKS.

ALGERIA.

Egyptian type cotton has till recently been cultivated in Algeria, but not very successfully. It has now been found that American type cotton is more resistant to local conditions, and it is expected that the adoption of this cotton will revive cotton production in Algeria.

Nearly the whole of the Algerian cotton exportation goes to France.

ARGENTINA.

High density presses are being erected in Barranqueras (Chaco), Santa Fé, and Buenos Aires; density is likely to be 600 to 700 kilos per cubic metre.

There is a very small production of perhaps 5,000 bales of $1\frac{1}{2}$ ins. to $1\frac{3}{4}$ ins., Washington standard, all for local consumption.

BULGARIA.

For many years prior to 1930 the yearly production of cotton used to vary between 700 and 900 tons (unginned), which was retained chiefly by the growers for their own cottage spinning needs. Cotton-growing for industrial needs is therefore a relatively new venture, and as it has not yet got into its proper stride, equipment such as presses and gins is as yet of a somewhat primitive and inefficient order.

The Government Experimental Stations are endeavouring to produce a seed of a cotton which will enable yarns of up to 24's to be spun locally (at present there are about 120,000 spindles installed, which number may be increased to about 150,000 spindles by the end of the present year). So far a fairly regular staple length of 21 to 22 mms. has been achieved. Thickness is about 21 microns and elasticity about 12 per cent.

There are no export or ginning taxes in force at present. As mentioned, locally-grown cotton is for home consumption only. The monopoly of purchase and sale of locally-grown cotton is vested in the (State) Agricultural Bank and ginning and pressing is accomplished at the Bank's collecting centres. The raw cotton is bought in from the growers at prices ranging from 30 to 34 leva per kilogramme (no allowance is made for seed), and after it has been ginned and pressed it is released to local spinners and other buyers. Local spinners are obliged to take up the total quantity available at 39 to 40 leva per kilo ginned, and failure to do so may lead to the National Bank refusing to grant a licence for the import of foreign cotton. The seed remains the property of the Bank.

CHINA.

It is pointed out that it is rather difficult to give information which would really cover all phases of Chinese cotton. There are any number of ways and means to convey cotton from the interior to the mills—in baskets, bags, hand-pressed bales, straw bales, jute bales, and finally press-packed bales. The information given relates to the Tientsin bale, up to the present practically the only Chinese cotton which has been exported to various countries all over the world. In addition to this, a good deal of very short rough fibre cotton is exported every year to Japan, which however is not used for spinning, but for padding their native clothes, blankets, etc. This kind of cotton is exported in any kind of package that will hold together until arrival, and the trade is not in the hands of the regular cotton merchants.

DOMINICAN REPUBLIC.

Reports from Ciudad Trujillo shows that only small quantities of raw cotton are produced in a somewhat sporadic manner by small cultivators in a remote district of the Republic and that it is shipped from the port of Monte Cristi, generally to Germany. The total shipments, during the year 1935, of "vegetable wool," in which raw cotton is included, barely reached 49 tons.

GREECE.

The Hellenic Cotton Institute point out that almost all the Greek cotton has been consumed locally. They expect this year to have a small surplus for export.

INDIA.

The East India Cotton Association reports that the average weight of the Indian bale varies considerably. The Association permits net weights per bale within the following limits, in lbs.:—

	Minimum	Maximum
Cambodia, Tinnivelly and Karangani...	384	500
S.G. Dharwar and M.G. Compta ...	360	396
All others	384	396

The tare is generally about 9 lbs.

With regard to the density of bales, the Association admit variations from about 45 lbs. to about 36 lbs. per cubic foot.

IRAN.

There has been no difference between bales for export or for domestic purposes, and measurements are not uniform, but the Société Anonyme de Coton, Laine et Peau, intend to establish new heavy presses in the exporting ports or other convenient centres in order to standardize the measurements and the weights of bales.

The present information is given in connection with the present baling practices in Iran.

MALTA.

No reliable figures are available. The cotton industry in Malta has practically ceased to exist. Since the Department of Agriculture was established in 1920, the outlook for cotton-growing in Malta has been so poor that the cultivation has not been encouraged, and no work has been carried out by the Department on cotton.

PERU.

Bale wires have a loop at one end and a hook at the other. Wires are attached while the bale is in the press, loop and hook ends being joined. Compression of the bale holds the wire in place.

Approximately 87.07 per cent. of the cotton grown in Peru is of the Tanguis variety, and about 7.86 per cent. belongs to the Pima variety. In the percentage remaining are included Sakellaridis, Mitafifi and Semi-Aspero.

The freight on Peruvian cotton is paid by weight and not by measurement, therefore the bales are not high-density pressed. The weight of the bales varies from 200 lbs. to 700 lbs. per bale. The general average being 480 lbs.

TURKEY.

Native cotton comprises some 60 to 70 per cent. of the total produced. The balance is from American and Cleveland seed.

YUGO-SLAVIA.

The production of cotton in Yugo-Slavia is very small, and restricted to a few peasant farmers; no large cotton firms exist in the country.



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U.S. GOVERNMENT'S DECEMBER CROP REPORT.

The preliminary final estimate of this season's American cotton crop, issued on December 8 last by the United States Department of Agriculture, indicates a production of 12,407,000 bales exclusive of linters. This is 7,000 bales larger than the estimate issued in November, and compares with 10,638,000 bales and 9,636,000 bales harvested in the two previous seasons. The crop total is exclusive of 58,000 bales grown in Lower California, where 72,000 bales were harvested last year. The average yield per acre this year is now estimated at 197.6 lbs., against 199.7 lbs. last month, and final estimates of 186.3 lbs. and 171.6 lbs. for the 1935 and 1934 crops. The harvested acreage is estimated at 30,054,000, which compared with 27,335,000 acres harvested last year and 26,987,000 acres in 1934, the average abandonment this year being estimated at 2.8 per cent., against 1.9 per cent. last year and 3.2 per cent. two years ago.

The following table gives details of acreage and production with comparisons (in thousands):—

			1934	1936	*1935	*1935
			Harvested	Yield	Harvested	Yield
			acres	bales	acres	bales
Virginia	..	..	53	34	52	30
North Carolina	..	..	958	612	930	572
South Carolina	..	..	1,403	820	1,362	744
Georgia	..	..	2,284	1,090	2,155	1,059
Florida	..	..	88	32	89	31
Missouri	..	..	378	310	302	177
Tennessee	..	..	810	431	736	317
Alabama	..	..	2,333	1,140	2,243	1,059
Mississippi	..	..	2,961	1,910	2,644	1,259
Louisiana	..	..	1,380	763	1,221	556
Texas	..	..	11,829	2,945	10,657	2,956
Oklahoma	..	..	2,295	290	2,318	567
Arkansas	..	..	2,564	1,295	2,137	853
New Mexico	..	..	117	110	90	75
Arizona	..	..	208	170	160	135
California	..	..	368	440	218	239
Other States	..	..	25	15	21	9
Total	..	..	30,054	12,407	27,335	10,638

* The 1935 figures are those revised in May, 1936.

BUREAU COMMENTS.

The Department of Agriculture, in its supplemental report, says that the crop has experienced two separate droughts. The first, which occurred in May and June, affected particularly the Carolinas and Georgia, where it retarded germination, as a result of which a considerable portion of the crop did not come up until late June or early July. The subsequent favourable weather enabled the crop partly to overcome the late start, and the fact that frost in the Atlantic States was a fortnight later than usual enabled the crop to reach maturity and to increase the outturn to the extent of 600,000 bales. The drought in the western section of the Belt came later in the season, causing a loss of over 800,000 bales in Texas and 200,000 bales in Oklahoma. The drought, which was also felt elsewhere in the western section, was broken early in September, and, while the rains came too late to bring back the crop in Texas and Oklahoma, they saved the crop in the Mississippi River States. The droughts reduced weevil damage to a minimum, and this, with the late frosts, resulted in the loss of Texas and Oklahoma being balanced by improvement in the central and eastern sections.

JANUARY GINNING REPORT.

The report of the Census Bureau issued on January 23, shows that up to the close of business on January 15 a total of 11,957,000 bales of the 1936 American cotton crop had been ginned. This compares with 10,248,000 bales to the same date last year, and 9,377,000 bales two years ago. The amount ginned since the previous report, which was made up to December 13, 1936, is 252,000 bales, against 493,000 bales in the corresponding period last season, and 204,000 bales in the season before. Included in the total are 281,000 round bales and 15,000 bales American-Egyptian cotton, against 282,000 round bales and 16,000 bales American-Egyptian in the corresponding report last year.

The following table gives details of ginnings with comparisons :

	1937	1936	1935
Alabama	1,133,000	1,028,261	934,308
Arizona	170,000	124,993	99,851
Arkansas	1,261,000	830,375	843,418
California	403,000	213,561	238,865
Florida	27,000	26,503	24,214
Georgia	1,074,000	1,041,245	970,810
Louisiana	742,000	540,648	472,297
Mississippi	1,855,000	1,222,324	1,118,941
Missouri	299,000	179,895	224,091
New Mexico	104,000	67,104	83,452
North Carolina	562,000	568,658	632,801
Oklahoma	288,000	541,569	323,086
South Carolina	768,000	726,767	678,738
Tennessee	421,000	312,229	393,577
Texas	2,809,000	2,790,569	2,292,074
Virginia	29,000	26,290	3,507
Other states	12,000	7,200	13,785
Total	<u>11,957,000</u>	<u>10,248,191</u>	<u>9,376,715</u>

THE U.S. LOAN COTTON.

The United States Commodity Credit Corporation recently made a further announcement as regards the terms on which, after the end of this month, farmers who received loans on the security of their cotton of the 1934-35 crop will be able to regain possession of it. The previous announcement, on January 2, stated that growers could recover their cotton at 25 points less than the average price of middling of $\frac{7}{8}$ in. staple provided that the average price in the ten designated spot markets is not less than 12.75 cents. Prices are now at or about the stipulated level, as they have been throughout the last few weeks, and the latest announcement says that, in the release of "loan" cotton, grade differences will be based on those existing on January 4: location differences will vary from a maximum of 25 points "on" the average price to a minimum of 56 points "off."

(Manchester Guardian.)

American Cotton Crop Prospects During 1937.

The following is taken from "The Farm Outlook for 1937," a publication issued recently by the U.S. Department of Agriculture Bureau of Agricultural Economics (Miscellaneous Publication No. 255):—

CASH CROPS—COTTON.

World supplies of cotton for the year beginning August 1, 1936, are larger than in either 1934-35 or 1935-36 and are nearly 18 per cent. above the average for the ten marketing years which ended in 1932-33, according to early November indications.

The increase in world supplies is mostly a result of marked expansion in production in the Union of Soviet Socialist Republics, Brazil, and China. In spite of a 17 per cent. increase in American production this year, world supplies of American cotton in 1936-37 are the lowest in six years and about 5 per cent. below the 10-year average. World supplies of foreign cotton in 1936-37 are expected to be nearly half again as large as the 10-year average. Foreign production this season will probably be more than 50 per cent. greater than the 10-year average.

COTTON CONSUMPTION UP.

World mill consumption of cotton, as estimated from reports of the International Federation, reached a new high level of about 27,000,000 bales last season. This was an increase of 6 per cent. over the previous season and was 14 per cent. above the 10-year average. Most of the increase in consumption over 1934-35 was in American cotton consumed in the United States. In spite of the increase, however, mill consumption of American cotton was still

6 per cent. below the 10-year average. World consumption of foreign cotton, on the other hand, was 40 per cent. greater than the 10-year average.

World business conditions are expected to continue to improve in 1937, and this should result in some increase in consumption of cotton. Most of this increase will probably be in foreign cotton, because of the comparatively small supplies of American and large supplies of foreign cotton. It is expected that world consumption of American cotton this year (1936-37) will be about equal to 1936 production. Carry-over stocks at the end of the year, therefore, will be about the same as those a year earlier.

The carry-over of foreign cotton at the end of the marketing year—even assuming some increase in consumption—probably will be somewhat larger than it was at the beginning of this year.

ACREAGE INCREASE IN 1937?

The present higher level of prices, abundant labour supplies, plenty of available land, and ample credit are all conducive to a substantial increase in acreage planted to cotton in 1937. It is not known, of course, what effect the agricultural conservation programme will have on acreage, since this programme has not yet (early November) been announced.

A substantial increase in cotton production in 1937 would result in some reduction in cotton prices, unless demand conditions or a rise in the general price level should offset it. Such a reduction in prices, however, would not necessarily mean lower incomes for cotton producers, as there would be a larger supply of cotton to sell. A decline in domestic cotton prices compared with foreign prices would tend to increase our exports of cotton.

The final test of the desirability of increasing cotton production is, of course, not alone a matter either of regaining foreign markets or of attaining high prices. The ultimate test is in the effect on incomes of cotton producers over a long period. A high price now at the expense of losing foreign outlets may in the long run be undesirable just as large exports at the expense of current prices and incomes may be undesirable.

COTTON PRICES RISE.

Cotton prices in domestic markets averaged 12 per cent. lower in 1935-36 than in the previous season and nearly one-third lower than the 10-year average. Since prospective supplies of American cotton are considerably smaller this season than they were a year earlier and since general demand conditions are better, domestic prices in August, September and October were about 1 cent above prices for those months in 1935.

During the last part of the summer and the early fall the Liverpool price of American cotton increased relative to some of the important foreign cottons, particularly Indian and Egyptian. With American supplies smaller than last year and Indian and Egyptian larger, the price ratio of these foreign cottons to American will probably continue lower than last season during most of this marketing year.

With prices higher than last year and a crop nearly 2,000,000 bales larger than in 1935, cash income from cotton will probably be considerably above last year's total and the largest in seven years.

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The 1937 Crop Programme.

The following is extracted from a report issued recently by the *American Cotton Crop Service*, of Madison, Florida:—

The 1937 agricultural programme was announced recently by Secretary Wallace and shows little change from the 1936 edition. It is our opinion, however, that unless some form of acreage control more drastic than the Soil Conservation Programme is put into operation, acreage reduction for the major crops in 1937 will be far from adequate. The Bureau of Agricultural Economics has recently issued a report showing, for the first time, how many acres of the various crops will be needed, employing various yardsticks as criterions for determining desirable production goals. The well-being of farmers can only be increased to a certain point by acreage adjustment, the report said. It is emphasized that when this point is reached a further increase in returns to farmers must come through increased industrial production rather than through a further decrease in the farm output. Increased industrial production would mean a greater demand for farm products and larger supply of industrial products available to farmers at more favourable prices in relation to the prices received by the farmers. Using the 1928-32 average crops acreages and the 1929-33 average numbers of livestock as representing the capacity of the American farm plant, the report concludes that:—

1. "With parity income as defined in the Soil Conservation and Domestic Allotment Act—the ratio between *per capita* farm income and *per capita* non-farm income which prevailed in the 1910 to 1914 period—as the only consideration, as much as 50,000,000 acres in such crops as cotton, corn, tobacco, and wheat of which we normally produce a surplus as compared with the 1928-32 average, might be necessary.

2. "With *per capita* domestic consumption of farm products the same as it was in 1920-29 period, the country would need to reduce the farm plant by only about 15,000,000 to 20,000,000 acres. This estimate assumes exports about the same as in the 1930-34 period, though they are at present less than about two-thirds of that level.

3. "The condition of the nation's farm land demands a shift of around 20,000,000 to 30,000,000 acres from soil-depleting to soil-conserving crops or other uses, in order to prevent further deterioration through erosion to maintain the fertility of the soil."

Assuming our clients are thoroughly familiar with the 1936 Farm Programme, we call attention to the more important features of the new programme as follows:—

1. Expenditures not to exceed \$500,000,000 as authorized under the Soil Conservation and Domestic Allotment Act.
2. Soil-depleting bases for farms will continue to be used as a yardstick to measure diversion from soil-depleting to soil-conserving crops.

3. Payment for shifts from general depleting crops and cotton, tobacco, and peanuts will be continued in 1937, together with payments to sugar and rice producers who participate in the programme.
4. Crops will be classified as soil-conserving and soil-depleting, as in 1936, but some changes will be made in classifications.
5. Administration by regions as in 1936.
6. Administrative expenses of all County Agricultural Conservation Associations will be deducted from payments to farmers. This has not been done in the South.
7. The range programme will be extended to include range lands in western parts of Southern and Northern regions.
8. The allowances which growers of vegetables and fruits can earn through soil-building practices will be increased.
9. Any farmer, no matter how small his farm, will have opportunity to earn not less than \$20.
10. Producers with sizeable acreages in permanent pasture will be given opportunity for additional participation in the programme.

In 1935 a total of 27,888,000 acres of cotton were harvested, according to the revised figures released last May. The acreage for harvest this year, according to the December 1 Bureau Report, is placed at 30,932,000 acres or an increase of 3,044,000 acres. If 1937 cotton acreage is increased in like proportion a total of 33,976,000 acres will be planted. If we assume the five-year average yield of about 170 lbs. per acre is produced in 1937, the total crop would be 11,914,000 bales. If the yield is 190 lbs. per acre the crop would be about 13,316,000 bales. A 200-lbs. yield per acre would give 14,017,000 bales, and a 210-lbs. yield 14,718,000 bales based on a harvested acreage of 33,500,000 acres.

Markets Lost to American Cotton.

The following is extracted from an article which appeared in a recent issue of the *Texas Weekly*:—

Lost cotton markets present a real problem to the United States. Just now a big noise is being made over the great increase in the consumption of cotton in the United States since August 1. During the three months ending October 31 United States mills consumed 428,000 bales more cotton than during the corresponding period a year ago, and the outlook is that all previous records will be broken during the current cotton year. American mills have orders on hand to-day that cannot be filled for several months. Practically all American mills have been working at capacity since early summer and some of them are so far behind that they are refusing new orders at this time. A recent press dispatch reported in this connection that world consumption of all growths

of cotton during October was 2,439,000 bales, as compared with 2,351,000 bales during the corresponding month last year. And it naively adds that "leaders of the textile industry said that there is no danger of a cotton shortage." Not with a carry-over of 7,000,000 bales, and a 1936 crop of 12,400,000 bales of American cotton! But what the press does not mention in this dispatch is that foreign consumption of American cotton fell off during the first three months of the current cotton year by 350,000 bales, while consumption of foreign cotton during the same period increased by 387,000 bales! And foreign consumption of American cotton didn't break any high records last year! Exports of American cotton since August 1 are running about 300,000 bales behind last year, a decline of about 11 per cent. All of this means that the record-breaking consumption of cotton in the United States during the current year will not result in any considerable increase in total world consumption of American cotton, due to the continuance of the progressive substitution of foreign cotton in other countries. If this tendency should continue very long in the future it will result in serious consequences for the ten cotton-growing States. For there is not the most remote possibility that the United States can absorb in increased consumption the American cotton that is being displaced by foreign cotton abroad. And it begins to appear that the extent of this substitution is measured largely by the supply of foreign cotton available. Last year more than 16,000,000 bales of cotton was produced outside the United States. What this means may be judged when it is said that prior to the collapse in 1929 the largest production of foreign growths of cotton during any year was slightly in excess of 11,000,000 bales. In 1928 the production of 16,000,000 bales of cotton outside the United States in a year would have seemed next to impossible. It is this circumstance which makes the outlook serious for the cotton-producing States, for while the world still requires a considerable amount of American cotton, it would seem to be seeking to become independent of American cotton as nearly as possible.

Why is this? A simple and direct answer to this question would be to say that the trade policy of the United States, the policy which the Roosevelt administration is endeavouring to reform by means of reciprocal trade agreements, has at last created a situation in which it is to the interest of most countries to buy as little of anything from the United States as possible. In other words, it has become so difficult for many countries to pay for goods purchased in the United States that they welcome other sources of supply of materials which they formerly obtained from the United States. In the case of cotton, this is equivalent to saying that the only thing that keeps most foreign countries from discontinuing the use of American cotton altogether is the inability to obtain an adequate supply elsewhere. And that means that there is a demand in the world for every pound of foreign cotton that can be produced. As long as this condition exists there will be continued efforts to expand the production of cotton outside the United States. And in such a situation it is certainly advisable for the United States to do more in the direction of curing it than simply to adjust American production to the reduced demand. To do nothing else over a period of years means that the necessity to reduce American

production will grow with the expansion of foreign production. Granted that reduced and rigidly controlled production was absolutely necessary as an emergency measure, is it not clear that this is not sufficient to deal effectively with the fundamental situation? Is it not clear that doing this and nothing else must result in prolonging the emergency indefinitely and making it worse in the long run? During the five years ending with 1929 the world outside the United States consumed 89,744,000 bales of cotton. During the next five years, ending with 1934, this was increased to 92,404,000 bales. But during the latter period consumption of American cotton outside the United States was reduced by 4,000,000 bales while consumption of foreign cotton increased by 6,700,000 bales. And the tendency shown by these figures has continued since 1934. During the twelve months ending July 31, 1935, consumption of American cotton outside the United States was 1,400,000 bales less than the annual average during the previous five years, while the consumption of foreign cotton during that year was nearly 3,000,000 bales more than the annual average of the previous five years. How much longer must this tendency continue in the direction it has been going before the American people, and especially the people of the ten leading cotton-growing States, shall become genuinely alarmed? There is every reason for alarm at the present moment. Indeed, there has been abundant reason for alarm ever since 1929. And yet even the people of the cotton-producing States, to say nothing of the cotton-producers themselves, are deluded into a belief that there has been "a large measure of recovery" for American cotton. There has been no recovery at all, so far as the fundamental situation is concerned, because the tendency to substitute foreign cotton for American cotton abroad and to increase the production of foreign cotton has continued unabated. And this tendency will not be checked, if ever, until the United States changes its trade policy fundamentally, more fundamentally than has been found possible so far through the negotiation of reciprocal trade agreements.

Effect of Artificially Drying Seed Cotton Before Ginning on Certain Quality Elements of the Lint and Seed and on the Operation of the Gin Stand.

THOSE of our readers who are concerned with the subject of moisture in American cotton, a subject which has figured prominently on the agenda at recent meetings of the International Cotton Committee, will doubtless be interested in the following extract from a treatise on the above, prepared by Messrs. F. L. Gerdes and Charles A. Bennett (Technical Bulletin No. 508. Published by the United States Department of Agriculture, Washington. Price 10 cents).

Excess moisture in seed cotton has long been recognized as one of the most important of the many problems involved in cotton ginning. More recently, data have become available which confirm

the seriousness of this problem. For example, an estimate made for the ginning season of 1932, a season not considered unusual with respect to weather conditions, indicated that approximately one-third of the cotton $1\frac{1}{8}$ ins. and longer in staple length, and about one-fifth of the cotton shorter than $1\frac{1}{8}$ ins., was more or less damaged in the ginning process as a result of too much moisture in the seed cotton.

A vertical drier for artificially drying damp or wet seed cottons has been recently developed in an effort to provide means for reducing the damage attributed to this cause.

Using 69 American upland cottons selected from the 1931, 1932 and 1933 crops to represent a wide range of seed-cotton characteristics, and employing the vertical drier, a series of studies was conducted with a view of determining (1) the relationships and the inter-relationships between the moisture content of seed cotton, the resulting quality of ginned lint, the amount of moisture that may be removed by artificial drying without reduction of fibre quality, and the desirable mechanical operation of the gin stand when handling cottons of different moisture content, and (2) the proper drying temperatures for cottons of different moisture content. The seed cottons were obtained from nine States, including and extending from Georgia and the Carolinas to Texas. They varied in moisture content, from 6.8 to 26.4 per cent.; in staple length, from $\frac{7}{8}$ in. to $1\frac{9}{32}$ ins; and they varied widely in other characteristics.

Portions of the seed cottons, dried and undried, were ginned on new and properly adjusted brush and air-blast types of gins at constant saw speeds and with loose and tight seed-roll densities (slow and fast rates of feed respectively). However, since the effects of drying were observed to be similar for the two types of gins, only the results for the brush type gin are presented in this bulletin.

Engineering observations and records were made during the tests on ginning operation and time, power requirements and energy consumption, and weight of products. Samples reserved from various stages were analyzed for moisture content, fibre-length array, colour, strength and germination. The lint samples from each test were classed for staple length, and for grade and its several factors—colour, leaf, and preparation.

The paired differences between undried and dried samples for each of the quality elements were grouped and were averaged by two staple-length groups, long and short by four moisture-content groups, and by four drying-temperature groups. Other groupings were made for special purposes.

The amount of moisture removed from seed cotton by drying at a temperature of 150 deg. F. increased with increase in moisture content on the average from 1 lb. per 100 lbs. of seed cotton for those with less than 12 per cent. moisture to 3 lbs. for those having 16 per cent. or more. The amount of moisture removed at the higher temperatures was only slightly greater than that at 150 deg., presumably due to the relatively short period of exposure in the drier (15 seconds) and to the fact that the relative humidity of the air heated to the higher temperatures is not appreciably lower than that at 150 deg.

The greater part of the drying action on seed cotton is confined to the fibres. The amount of moisture removed from lint per 100 lbs. by drying at 150 deg. F. ranged from an average of 1.5 lbs. for seed cottons below 12 per cent. in moisture to an average of 4 lbs. for those having 16 per cent. or more, and increased slightly with higher drying temperatures.

The moisture content of seed cotton has a pronounced effect on the smoothness with which it is possible to gin the lint, successively lower preparation being associated with increases in moisture content. The unfavourable effects of ginning cottons with excess moisture are intensified as the staple length of the cotton is increased and as the seed-roll density is changed from loose to tight.

Average grade improvements, or the combined influence of generally smoother preparation and occasionally brighter colour and reduced leaf, as a result of artificial drying, were more pronounced for the longer than for the shorter cottons. Drying at a temperature of 150 deg. F. showed grade benefits ranging, on the average, from about one grade for either length group having 16 per cent. or more moisture, to approximately one-third of a grade for the longer cottons having 8 to 11.9 per cent. and the shorter cottons having 12 to 15.9 per cent. moisture. Cottons having a moisture content below these respective limits did not show enough grade improvements to justify drying.

Staple length, on the average, was preserved when the seed cotton was dried at 150 deg. F., but higher drying temperatures were, in general, accompanied by ginned lint with slightly shorter staple length as shown by classification and with increased variability of fibre length. In many cases, drying temperatures above 200 deg. were associated with shortening of staple to an extent of $\frac{1}{16}$ to $\frac{1}{8}$ in.

Average fibre strength was not weakened by drying the tested seed cottons at temperatures up to 200 deg. F., but there appeared to be a slight weakening of the fibres when the material was dried twice in succession at 250 deg.

The temperature of the hot air at the inlet of the drier should not greatly exceed 150 deg. F., except for very wet cotton and then should seldom, if ever, exceed 200 deg. The critical temperature is reached sooner with short-staple or lower moisture-content than with long-staple or higher moisture-content cottons respectively.

Based on average grade and staple premiums and discounts at Memphis, Tenn., for the 1932-33 season, drying long-staple cottons of relatively high moisture, averaging 14 per cent., increased the average monetary value per bale about \$3, or 8 per cent., when ginning with a loose seed-roll, and \$2, or 6 per cent., with a tight roll. Drying and ginning with a loose roll increased the average value of the same cottons approximately \$7, or 20 per cent., compared with that for corresponding portions ginned damp or wet with a tight seed-roll. This latter practice is frequently customary in commercial ginning plants. Tables show that long-staple cottons, having an average of 10.8 per cent. moisture, showed increases in value from drying of over \$3, or 10 per cent., when ginned with a loose seed-roll, and \$1, or 3 per cent., with a tight

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roll. Ginning portions with a loose seed-roll after drying gave an increase in value of over \$4, or 14 per cent., as compared with the value of the cotton obtained with a tight seed-roll without drying.

With short-staple cottons of relatively high moisture, averaging 15 per cent., the average monetary value per bale was increased 67 cents, or almost 2 per cent., by drying when ginned with a loose seed-roll, and 68 cents, or 2 per cent., with a tight roll. The value of these cottons dried and ginned with a loose seed-roll was higher by almost \$1.50, or 4 per cent., than that obtained when portions were ginned damp or wet with a tight seed-roll. Shorter staple cottons, averaging 10.8 per cent. in moisture, showed decreases in monetary value with drying.

Although the actual differences in the weight of bales due to drying are not permanent, the loss in weight of the material has been considered in the calculations showing changes in monetary value as a result of drying seed cotton. The results obtained from a storage test at Leland, Miss., have shown that under those conditions, the bale of undried (damp) material rapidly lost weight; that the dried material gained slightly, and that, at the end of 10 weeks, the bales differed in weight by only 4 lbs. Obviously, a consideration of any subsequent loss in weight of the undried bales and gain in weight of the dried bales during storage would have increased slightly the benefits in monetary value reported herein for artificial drying of damp or wet seed cotton.

The beneficial effects of artificial drying, as shown by the differences between paired samples, are considered as being probably of smaller magnitude than would have resulted had machinery been used in these experiments that was more or less worn out or obsolete, or inadequately repaired, or improperly operated.

The percentage germination of seed from portions of seed cotton dried at test temperatures was not reduced by drying; on the contrary, the dried portions show germination of slightly higher percentages.

Facilities for artificial drying at the gin permit cotton picking to be continued during damp seasons, and in fields of heavy foliage sooner than otherwise would be desirable. An opportunity is afforded by this means to handle cotton which heretofore has been left unpicked because of inadequate means for conditioning and ginning.

Artificial drying of green, damp, or wet seed cotton enables continuous operation of the gin without loss of time due to chokages or breakdowns, allows a reasonable increase in ginning capacity at no loss of quality to the product, and affords a slight reduction in power requirement.

The vertical drier offers satisfactory ginning volume and maximum safety to both the product and the ginning plant, and the results thus far obtained with it compare favourably with those generally attributed to sun-drying and storing. In the light of present-day farm organization, this drier added to gin equipment gives promise of being one of the most practical and economical means for drying seed cotton. Observations made of commercial

drying installations show that the operating cost of drying seed cotton amounts to only 20 to 50 cents per bale.

It seems reasonable to expect that, when comparable operating conditions are employed, other designs of driers will give results generally in line with those presented herein for the vertical drier.

TEXAS COTTON FARM INCOMES.

Dr. A. B. Cox, the well-known American economist, writing in a recent issue of the *Texas Business Review*, makes the following statement:—

"Cotton is grown primarily for the cash received for the lint, though the by-product, cotton-seed, constitutes the surest and in many ways the most valuable food and feed crop grown in Texas. Prior to the depression, the sale of cotton lint accounted for about 50 per cent. of the total cash income on all farms and ranches in Texas and about 80 per cent. of the total cash income from crops. Certainly cotton is the hub of agricultural prosperity in Texas. United States Department of Agriculture figures published in October, 1936, showed a decline in the total cash income received from the sale of lint cotton in Texas from a three-year pre-depression average of \$407,000,000 to \$156,000,000 during the past two years, a decline of \$251,000,000 or nearly 60 per cent.

"It is proposed now to make a further analysis of these figures to see what has happened to individual farmers. Certainly the cotton growers of Texas did not receive an undue portion of the national income prior to the depression. Let us see what has happened. According to the United States Census of Agriculture, 1925, cotton growers in Texas received an average of \$1,371 per farm in that year from the sale of lint cotton. In 1930 that income had dropped to \$843 per farm, according to the Census. The Census for 1935 shows the average income to cotton growers in Texas from the sale of lint cotton to be only \$401 per farm. These figures, startling as they are, do not carry the full import of the situation in so far as Texas is concerned; for during the ten years from 1925 to 1935 there was a decrease in the number of farms reporting the sale of lint cotton from 410,144 in 1925 to 364,249 in 1935, or a decrease of 45,895. It is significant to note also that during that same period the total number of farms in the State increased 35,370, or from 465,647 in 1925 to 501,017 in 1935.

"To what extent do Government rental and benefit payments make up for this loss? During 1935 Texas cotton growers received \$47,000,000 from the Federal Government in rental and benefit payments and bonuses under the 12 cents guaranteed price. This is an average of \$129 for each cotton farm, thus raising the cash income in 1935 from lint cotton from \$401 to \$530 per farm.

"Cotton growers were dissatisfied in 1928, 1929, and 1930 because of low income; yet their income from the sale of lint cotton averaged nearly twice as much during those three pre-depression years as in 1935, even after Government bonuses are included. Can the cotton growers be expected to accept without strong protest a long continuance of the present low income?"

TABLE I.

COTTON: AMERICAN, FOREIGN AND ALL GROWTHS

Production, Carry-over, and Supply, Exports from United States, and price at 10 spot markets in United States, 1920-21 to date.

Table prepared by the U. S. Bureau of Agricultural Economics Department of Agriculture, Washington.

Season beginning August 1	American										Foreign				Produc- tion		All kinds	
	Carry-over beginning of season										Produc- tion		Carry- over		Supply		Produc- tion	
	Exports	Produc- tion	United States	World	Supply	Price per lb.	Price per lb.	Price per lb.	Price per lb.	Price per lb.	Produc- tion	Carry- over	Produc- tion	Carry- over	Supply	Produc- tion	Carry- over	Supply
	1,000 bales	478 lbs.	1,000 bales	1,000 bales	1,000 bales	100 cents	100 cents	100 cents	100 cents	100 cents	478 lbs.	1,000 bales	478 lbs.	1,000 bales	1,000 bales	478 lbs.	1,000 bales	1,000 bales
1920-21 ..	5,973	13,429	3,279	6,338	19,767	16-66	7,578	4,847	12,425	21,007	11,185	32,192	11,185	32,192	11,185	32,192	11,185	32,192
1921-22 ..	6,348	7,945	6,361	9,393	17,338	18-09	7,489	4,404	11,893	15,434	13,797	29,231	13,797	29,231	13,797	29,231	13,797	29,231
1922-23 ..	5,007	9,755	2,665	5,162	14,917	25-83	9,507	4,492	13,999	19,262	9,654	28,916	9,654	28,916	9,654	28,916	9,654	28,916
1923-24 ..	5,815	10,140	2,129	3,304	13,444	30-14	9,555	3,578	13,133	19,695	6,882	26,577	6,882	26,577	6,882	26,577	6,882	26,577
1924-25 ..	8,240	13,630	1,439	2,705	16,335	24-22	11,300	3,311	14,611	24,930	6,016	30,946	6,016	30,946	6,016	30,946	6,016	30,946
1925-26 ..	8,267	16,105	1,504	3,386	19,491	19-68	11,826	3,567	15,393	27,931	6,953	34,884	6,953	34,884	6,953	34,884	6,953	34,884
1926-27 ..	11,299	17,978	3,414	5,495	23,473	14-40	10,439	4,014	14,453	28,417	9,509	37,926	9,509	37,926	9,509	37,926	9,509	37,926
1927-28 ..	7,857	12,966	3,663	7,696	20,652	19-72	11,075	3,979	16,054	24,031	11,675	35,706	11,675	35,706	11,675	35,706	11,675	35,706
1928-29 ..	8,419	14,477	2,426	5,114	19,591	18-67	12,286	4,572	16,858	26,763	9,686	36,449	9,686	36,449	9,686	36,449	9,686	36,449
1929-30 ..	7,035	14,825	2,130	4,409	19,234	15-79	11,846	4,600	16,446	26,671	9,009	35,680	9,009	35,680	9,009	35,680	9,009	35,680
1930-31 ..	7,133	13,932	4,322	6,287	20,219	9-61	12,189	5,030	17,219	26,121	11,317	37,438	11,317	37,438	11,317	37,438	11,317	37,438
1931-32 ..	9,193	17,097	6,263	8,868	25,965	5-89	10,499	4,838	15,337	27,596	13,706	41,302	13,706	41,302	13,706	41,302	13,706	41,302
1932-33 ..	8,895	13,003	5,580	12,960	25,963	7-15	10,937	4,071	15,008	23,940	17,031	40,971	17,031	40,971	17,031	40,971	17,031	40,971
10 year average																		
1923-24 to 1932-33	8,215	14,414	3,687	6,022	20,436	16-53	11,196	4,166	15,352	25,610	10,178	35,788	10,178	35,788	10,178	35,788	10,178	35,788
1933-34 ..	7,964	13,049	8,081	11,688	24,637	10-81	13,651	4,539	18,190	26,700	16,127	42,827	16,127	42,827	16,127	42,827	16,127	42,827
1934-35 ..	5,037	9,636	7,648	10,634	20,270	12-36	14,164	5,602	19,766	23,800	16,236	40,036	16,236	40,036	16,236	40,036	16,236	40,036
1935-36* ..	6,267	10,638	7,138	9,009	19,647	11-55	15,862	4,803	20,665	26,500	13,812	40,312	13,812	40,312	13,812	40,312	13,812	40,312
1936-37* ..	—	12,400	5,324	7,000	19,400	—	17,500	5,200	22,700	29,900	12,200	42,100	12,200	42,100	12,200	42,100	12,200	42,100

Exports compiled from reports of the Bureau of Foreign and Domestic Commerce.

Prices based on daily telegrams received from each of the 10 designated spot markets.

Production, carry-over and supply—estimates of the Bureau of Agricultural Economics, based on data compiled from reports of official governmental agencies or from reliable trade sources.

* Preliminary.

TABLE 2.

**Prices of Specified Types at Liverpool, Exports, Supply, and Consumption at Specified Locations,
1921-22 to date.**

Season beginning August 1 except as noted	Prices at Liverpool				Ratio		Exports		World supply,		Consumption in	
	American		Indian		Three types Indian to two types American		From ten United States export count		beginning of season		foreign countries	
	Actual		Actual		†		†		Ameri- can growths		Ameri- can growths	
	Aug.- July	April- March	Aug.- July	April- March	Per cent.	Per cent.	1,000 bales	1,000 lbs.	Per cent.	1,000 bales	Per cent.	1,000 bales
1921-22	11.26	9.82	9.12	7.92	81.1	80.7	6,348	10,913	58.2	17,338	29,231	7,093
1922-23	14.92	13.72	10.72	10.37	72.1	75.6	5,007	10,133	49.4	14,917	28,916	6,343
1923-24	17.67	17.02	13.20	12.48	74.6	73.3	5,815	10,844	53.6	13,444	26,577	5,747
1924-25	13.46	14.96	11.61	12.28	86.4	82.1	8,240	13,587	60.6	16,335	30,946	7,353
1925-26	10.20	11.48	8.67	9.76	84.9	85.0	8,267	13,807	59.9	19,491	34,884	7,560
1926-27	7.65	7.88	6.82	6.81	89.3	86.4	11,299	16,312	69.3	23,473	37,926	8,897
1927-28	10.99	9.98	9.04	8.52	82.4	85.4	7,857	12,703	61.9	20,652	35,706	8,872
1928-29	10.28	10.74	7.91	8.45	77.0	78.7	8,419	14,234	59.1	19,591	36,449	8,288
1929-30	8.75	9.51	6.12	6.93	69.5	72.9	7,035	12,667	56.5	19,234	35,680	7,212
1930-31	5.47	6.40	3.96	4.39	72.7	68.6	7,133	12,557	56.8	20,219	37,438	5,817
1931-32	4.72	4.88	4.21	4.16	89.1	85.2	9,193	13,040	70.5	25,965	41,302	7,572
1932-33	5.47	5.02	4.73	4.47	86.7	89.0	8,895	13,152	67.6	25,963	40,971	8,167
Average for ten years ended 1932-33	9.47	9.79	7.63	7.83	81.3	80.0	8,215	13,289	61.8	20,436	35,788	7,549
1933-34	5.82	5.68	4.29	4.40	74.0	77.5	7,964	13,554	58.8	24,637	42,827	7,981
1934-35	6.78	6.64	4.88	4.66	72.3	70.2	5,037	10,912	46.2	20,270	40,036	6,098
1935-36 §	6.30	6.32	5.01	5.03	79.5	79.6	6,267	—	—	19,647	40,312	6,455
1936-37 §	—	—	—	—	—	—	—	—	—	19,400	42,100	—

Compiled or estimated from data released by official governmental agencies or reliable trade sources.

* Average of American—Low Middling and Middling.

† Average of Indian—Fully Good Broach, Fine Omra and Fully Good Sind.

‡ United States, India, Egypt, Anglo-Egyptian Sudan, Argentina, China, Brazil, Peru, Russia, and Mexico. Calendar year for

§ China, Peru, Russia, and Mexico.

§ Preliminary.

AMERICAN COTTON AND THE "OUTSIDE" GROWTHS.

In a new year message on the outlook for the raw cotton trade Mr. John C. Botts, president of the New York Cotton Exchange, points out that in looking ahead to the coming year the trade may well expect continued large consumption of all growths of cotton in the aggregate, provided that business and political conditions do not impair the world's buying power. While world stocks of cotton are less than in the recent years of burdensome supplies there is little ground for anticipating a shortage unless weather and insect conditions are abnormally unfavourable. Encouragement is to be found in the prospect that the United States Government will further reduce, and may even entirely dispose of, its remaining stocks which are held as collateral for producers' loans. If these stocks are disposed of, Mr. Botts says, if the United States produces a crop of reasonable size, and if American cotton is allowed to flow into world markets in free competition with "outside" growths, the United States may make progress in rebuilding its trade in cotton with those countries where it has suffered severe losses. Full recovery, however, can hardly be expected unless or until those countries which have been forced to reduce their purchases by lack of dollar exchange are enabled to obtain larger amounts of exchange through the channels of trade with the United States.

The competition which American cotton is now experiencing is not based entirely on price, as spinners in some countries are buying cotton elsewhere either from choice, in order to try and rectify trade balances, as Japan is doing in some instances, or because more suitable terms or methods of payment are available elsewhere. At any rate, cotton production is being increased in most countries and, so far at any rate, the larger crops are moving into consumption somewhere or other readily enough.

(*"Manchester Guardian."*)

COTTON PRODUCTION IN LOUISIANA.

According to a publication of the U.S. Department of Agriculture, Bureau of Agricultural Economics, entitled "Grade and Staple Length of Cotton Produced in Louisiana, 1928-1934," cotton produced in Louisiana, in general, averaged higher in grade and longer in staple than the corresponding average for the United States during the seven-year period under review.

About 77 per cent. of the cotton produced in Louisiana was Extra White and White in colour and Middling and better in grade, as compared with about 69 per cent. for the United States. Near 42 per cent. of the cotton produced in the State during the seven years was 1 in. and longer in staple, as compared with 26 per cent. for the United States. The average length of staple for cotton produced in Louisiana was 15.71 sixteenths of an inch; for the United States it was 15.35 sixteenths of an inch. Improvement in staple length is indicated for both Louisiana and the United States during the period.

THE EFFECT OF GOVERNMENT LOAN COTTON AND OUTSIDE GROWTHS.

The increase in the prospective American cotton crop from 11,121,000 to 12,400,000 bales in the last two months should tend to cause American cotton to sell at more favourable prices relative to foreign growths than it would have otherwise, states Mr. Alston Garside, but foreign consumption of the American staple this season will doubtless be affected to a substantial degree by the policy pursued by the Government with respect to releasing the approximately 3,000,000 bales of loan cotton. It is understood that a substantial portion of the cotton in the loan stock is of qualities which compete most directly with foreign cottons. It is obvious that foreign consumption of American cotton last season would not have been nearly so large as it was if the Government had not released the approximately 2,000,000 bales of spots that were sold between last January and last July.

An all-cotton consumption of 29,000,000 bales or more this season, an idea held in various trade quarters, does not seem unreasonable as a tentative expectation. This would compare with the prospective world all-cotton crop of about 30,000,000 bales.

(*"Cotton," Manchester.*)

CROP REPORTS.

The American Cotton Crop Service, of Madison, Florida, state as follows, under the date of January 13, 1937 :—

During the week ending January 11 outdoor farming operations in most sections of the Cotton Belt were delayed by rain, sleet and snow. The delay in outdoor work is of little or no importance at this time of the year, however, and storage of subsoil moisture will, no doubt, prove most beneficial to the 1937 crop. Crop observers report farmers in many sections of the Belt somewhat slow in deciding upon the 1937 crop programme. Soil Conservation Rules are expected to be revised and include more drastic acreage control rules. Sales of livestock during the fall months have been unusually heavy, and implement dealers report good increases in sales. There will be a very heavy increase in flue-cured tobacco acreage in the southern half of the Eastern Belt owing to the relatively high price for which tobacco sold during the past season. To date, low winter temperatures have been of little importance in so far as the cotton insect outlook is concerned.

Messrs. Weil Brothers, Montgomery, Alabama, in their semi-monthly crop letter, dated January 15, 1937, state as follows :—

Cotton farming interests have experienced an evolution since 1930. Through lack of financial assistance in the beginning of the depression, farmers first became impressed and later accustomed to the necessity of providing from their own soil food crops for themselves and their live stock. Nevertheless, they held to the idea of putting their best lands in cotton. Last season's production per acre showed a marked increase and would have been more marked except for the drought in the extreme Western and extreme Eastern states. There is a growing tendency for larger production per acre through selection of lands and fertilizers and more intense cultivation. With the spread of the boll-weevil quick and early maturing seed became the order of the day and the splendid quality and staple of the Eastern Belt quickly faded away but, the last few years, there has been a reversal and alert farmers are turning to new seed that lead to better character and longer staple—increasing the spinning value and price. North and South Carolina have already made a remarkable come-

back, due largely to education and propagation by South Carolina seed growers. Georgia, Alabama and Central Tennessee have been of somewhat slower improvement and much remains to be done, but the greatest need is in the West, which supplies most of our export cotton.

The American Cotton Crop Service cabled the following crop information to Messrs. Comtelburo Ltd., on Wednesday, January 27, 1937 :—

Land preparation slightly behind usual at end of January. Acreage increase intentions point to total of about 10 per cent. Winter weather unusually mild, with little weather sufficiently cold to kill weevils in winter quarters.

SUPPLY AND DISTRIBUTION OF COTTON IN THE UNITED STATES.

The following table has been compiled by the U.S. Department of Commerce Bureau of the Census :—

(Quantities are given in running bales, except that round bales are counted as half bales and foreign cotton and domestic cotton, re-imported, in equivalent 500 lb. bales. Linters are not included).

SUPPLY

On hand August 1, 1935, total	..	..	..	7,208,477
In consuming establishments, total	..	..	788,989	
In cotton-growing States	..	..	596,479	
In all other States	..	..	192,510	
In public storage and at compresses, total	..	..	5,739,488	
In cotton-growing States	..	..	5,594,632	
In all other States	..	..	144,856	
Elsewhere (partially estimated)*	..	..	680,000	
Imports foreign cotton	..	..	..	154,817
Ginnings, crop of 1935, total	..	..	10,420,346	
Prior to August 1, 1935	..	..	94,346	
During cotton year 1935-36	..	..	10,326,000	
Ginnings, crop of 1936 prior to August 1	..	..	41,130	
Ginnings during year ending July 31, 1936	..	..	..	10,367,130
Aggregate supply	..	..	..	<u>17,730,424</u>

DISTRIBUTION

Exports domestic cotton, total	..	..	..	5,972,566
Re-imported	..	..	..	1,756
Net exports	..	..	..	5,970,810
Consumed, total	..	..	..	6,351,160
In cotton-growing States	..	..	..	5,335,801
In all other States	..	..	..	1,015,359
Destroyed	..	..	..	35,000
On hand July 31, 1936, total	..	..	..	5,409,389
In consuming establishments, total	..	..	..	896,724
In cotton-growing States	..	..	..	706,506
In all other States	..	..	..	190,218
In public storage and at compresses, total	..	..	..	3,937,665
In cotton-growing States	..	..	..	3,893,720
In all other States	..	..	..	43,945
Elsewhere (partially estimated)*	..	..	..	575,000
Aggregate distribution	..	..	..	<u>17,766,359</u>
Excess of distribution over supply†	..	..	..	<u>35,935</u>

* Includes cotton for export on shipboard but not cleared; cotton coastwise; cotton in transit to ports, interior towns, and mills, cotton on farms, etc.

† Due principally to the inclusion, in all distribution items, of the "city crop," which consists of rebaled samples and pickings from cotton damaged by fire and weather.

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The Egyptian Government Crop Estimate.

The latest estimate of the current Egyptian cotton crop issued by the Ministry of Agriculture differs only slightly from the estimate issued in October. The Bourse de Minet-el-Bassal earlier estimated the total yield at 9,210,000 cantars, while the Ministry's figures are shown, with comparisons, in the following table:—

(In cantars—000's omitted)

				1936-7		1935-6	
				Second estimate	First estimate	Second estimate	Final estimate
Sakellaridis	..	..	..	565	561	977	901
*Other long staples	..	..	..	2,511	2,499	1,738	1,754
†Medium staples	..	..	..	178	182	238	208
‡Short staples	..	..	..	5,977	5,942	5,321	5,478
Total	..	..	..	9,231	9,184	8,274	8,342

* Maarad, Sakha 4, and Giza 7.

† Giza 12, Fouadi, Giza 3, and other varieties.

‡ Ashmouni and Zagora.

In addition, it is estimated there will be 215,000 cantars of scarto.

The figures show that Sakellaridis now represents about 6 per cent. of the total crop (as compared, say, with 32 per cent. in 1928-29), thus suggesting the absurdity of having only two futures contracts, one for Sakellaridis and one for Ashmouni, in the Alexandria market. The Egyptian Government, however, has now directed that a contract is to be introduced for Giza 7, which now provides the bulk of the "other long staples" in the Egyptian crop. Unlike Liverpool, the Alexandria market will not allow the existing Sakellaridis contract to lapse as soon as the Giza 7 contract has been established.

The Egyptian Cotton Crop.

Commenting upon the Egyptian Ministry of Agriculture's second estimate of this season's cotton production, the *Egyptian Gazette* makes the following statement:—

“On the figures as they stand, the crop will be by far the largest Egypt has yet produced. The previous record was 8,634,851 cantars in 1926-27, and that figure has only been approached within a quarter of a million cantars on two occasions since. The first was in 1929-30, when production totalled 8,485,089 cantars, and the second was in 1933-34, when 8,411,068 cantars were harvested. Notwithstanding the unprecedented dimensions of the present crop, however, the prospective supply, owing to the greatly reduced carry-over, is considerably smaller than in the seasons 1930-31, 1931-32 and 1933-34, and only exceeds the average of the ten seasons from 1926-27 to 1935-36 by some 300,000 cantars. The following table shows the carry-over, crop and total supply in each of the seasons in that period, the crop figures quoted being the Alexandria receipts in seasons prior to 1930-31 and the final official production estimates in that and subsequent seasons:—

Season					Carry-over from previous season	Crop Cantars	Supply Cantars
1926-27	..	..	..	..	1,100,500	8,634,851	9,735,351
1927-28	..	..	..	..	1,780,000	6,096,822	7,786,822
1928-29	..	..	..	..	1,153,229	8,011,680	9,164,909
1929-30	..	..	..	..	1,164,223	8,485,089	9,649,312
1930-31	..	..	..	..	3,456,971	8,329,454	11,786,425
1931-32	..	..	..	..	4,068,608	6,215,755	10,284,363
1932-33	..	..	..	..	3,283,103	4,844,572	8,127,675
1933-34	..	..	..	..	1,722,279	8,411,068	10,133,347
1934-35	..	..	..	..	973,739	7,390,520	8,364,259
1935-36	..	..	..	..	442,708	8,534,927	8,977,635
Average	..	..	..	..	1,914,536	7,495,474	9,410,010
1936-37	..	..	..	..	488,888	9,231,000	9,719,888

An outstanding feature of this season's crop figures is the further extensive curtailment of cultivation of Sakellaridis in favour of Giza 7 which they reveal. The tables below illustrate the rapidity of the change which has taken place in recent years in the proportionate plantings and production of the two varieties:—

ACREAGE

Season					Sakellaridis Feddans	Giza 7 Feddans
1930-31	..	..	..	..	837,344	5,329
1931-32	..	..	..	..	478,579	34,710
1932-33	..	..	..	..	369,294	35,086
1933-34	..	..	..	..	391,051	124,330
1934-35	..	..	..	..	419,502	286,543
1935-36	..	..	..	..	297,409	269,795
1936-37	..	..	..	..	162,072	407,022

EGYPTIAN COTTON

PRODUCTION

Season	Sakellaridis Cantars	Giza 7 Cantars
1930-31	2,100,163	Unavailable
1931-32	1,350,077	Unavailable
1932-33	1,252,785	112,288
1933-34	1,198,908	340,890
1934-35	977,216	855,369
1935-36	901,137	1,266,810
1936-37 (est.)	565,000	2,000,000

In official quarters the further progressive displacement of Sakellaridis is anticipated. Many private authorities expect to see the tendency for substitution of Giza 7 checked, and perhaps even reversed next year owing to the relatively high prices obtained this season for Sakellaridis, but it seems inevitable that the latter variety will eventually disappear, to be replaced by other higher-yielding long-staple cottons.

The "into-sight" movement of the crop in the first quarter of the season has been extremely rapid, Alexandria receipts up to November 30 totalling 4,653,552 cantars, against 4,660,171 cantars in the same period of last year—a figure for which the records of previous seasons furnish no parallel—and ten-year average of 3,580,000 cantars. The "out-of-sight" movement has been relatively slow, exports and consumption by local mills up to November 30 aggregating some 2,568,000 cantars, against 3,150,000 cantars last year. The latter figure constituted a record for the period, however, exceeding by a margin of more than half a million cantars the previous ten-year maximum of 2,550,000 cantars in 1933, so that by comparison with more normal seasons the rate which has been maintained up to the present is by no means unsatisfactory. The residual supply in Alexandria and up-country on December 1 amounted, on the basis of the present production estimate, to 7,150,000 cantars.

EGYPTIAN COTTON GINNED TO END OF DECEMBER, 1936.

The Egyptian Ministry of Agriculture announces that the cotton ginned in all the ginning factories in Egypt since the beginning of the season to the end of December, 1936, is as follows (in cantars):—

	1936-37 Dec.	1935-36 Final	1934-35 Final
Sakellaridis	386,113	853,613	882,279
Other long staple varieties	1,694,663	1,656,571	1,119,246
Medium long staple varieties	100,314	197,286	190,563
Medium staple varieties	4,471,424	5,181,930	4,755,293
Total	6,652,514	7,889,400	6,947,381
Scarto	136,295	176,131	149,189
Total including Scarto	6,788,809	8,065,531	7,096,570

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Strength of Egyptian Cottons.

Mr. H. A. Hancock, Spinning Technologist to the Egyptian Ministry of Agriculture, during the course of a lecture which he recently gave in Alexandria, discussed the probable relative values of new cottons now on the market, such as Giza 12 and Giza 26. The information now given supplements Mr. Hancock's paper prepared for the meeting of the Joint Egyptian Cotton Committee last July, published in the October, 1936, issue of the INTERNATIONAL COTTON BULLETIN.

It was stressed that the Government had no voice in deciding the areas of new cottons taken up by ordinary cultivators. A new cotton would only succeed if it gave a better return than those it replaced. Sakel was dying out simply because it could not compete in over-all return with such cottons as Giza 7 and Giza 12, which were head and shoulders above any other cottons grown in the Delta and had already eliminated most of the "other varieties." It was regarded as unlikely that Delta Ashmouni (Zagora) could survive for long. Still better cottons were already in sight, although at present only in minute quantity.

Mr. Hancock concluded by reminding those present that the Research Departments were ready to assist merchants and growers in any technical problems concerning cotton quality, and that it was up to them to take advantage of the facilities the Government offered.

The following interesting summary of tests on commercial cottons, taken by the Giza Experimental Spinning Station, was submitted by Mr. Hancock:—

AVERAGE OF 1934 AND 1935 CROPS

	Strength Produce	Taker-in Waste	Hair Weight	Staple Length	Average Spot Price Dollars
Sakel	60's	0/0		$\frac{1}{8}$ ths	
F.G. ..	2,880	3.0	136	23	19.2
F.G.F. ..	2,430	5.4	134	22 $\frac{1}{2}$	15.7
Sakha 4					
F.G. ..	2,720	3.6	134	24 $\frac{1}{2}$	18.7
F.G.F. ..	2,450	5.2	123	23	16.0
Maarad					
F.G. ..	2,620	2.9	134	24 $\frac{1}{2}$	18.0
F.G.F. ..	—	—	—	—	16.0
Giza 7					
F.G. ..	2,490	4.3	150	22	17.0
F.G.F. ..	2,285	6.5	148	22	14.8
Giza 12					
F.G. ..	2,305	4.1	154	22 $\frac{1}{2}$	15.3
F.G.F. ..	2,135	5.9	140	22	13.9
Uppers					
F.G. ..	1,860	5.6	184	20	14.8
F.G.F. ..	1,710	9.1	179	19 $\frac{1}{2}$	13.4
Zagora					
F.G. ..	1,645	6.1	196	19 $\frac{1}{2}$	14.2
F.G.F. ..	1,520	8.4	181	19 $\frac{1}{2}$	13.2

Comparison between 1934 and 1935 Crops. All cottons

1934 Crop	..	2,190	5.7	154	21.2	15.3
1935 Crop	..	2,200	5.5	156	21.9	16.0

Example of the relation between strength and grade

	Strength Produce	Taker-in Waste	Hair Weight	Staple Length	Average Spot Price
	60's	6/0		$\frac{1}{16}$ ths	Dollars
Giza 7	F.G.F.	F.G.F./Good	Good	Good/F.G.	F.G.
Strength	2,210	2,260	2,315	2,485	2,530
Taker-in waste ..	7.1	5.8	5.1	4.6	4.1

THE ALEXANDRIA CONTRACT FOR GIZA 7.

New regulations have been adopted by the Egyptian Government which provide for a new cotton futures contract affording protection for holders of Giza 7 cotton on hedge. An *arrete* was issued recently by the Minister of Finance, making the necessary change in the Bourse regulations. In this connection the *Egyptian Gazette* states the following:—

“Thus an end has been put to a highly undesirable situation involving grave prejudice to the trade in general as a result of the failure of the Sakel contract to provide a proper hedge for Giza 7. Sakellaridis has ceased to be either the characteristic or quantitatively the most important of the long-staple cottons grown in Egypt. Its place was taken last year by Giza 7, and it seems likely that in the present season four cantars of this latter variety will be harvested for every cantar of Sakellaridis. Yet Fully-Good-Fair Sakellaridis had remained the basis of the long-staple contract, and under the conditions governing delivery against it tenderers of Giza 7 were obliged to bonify receivers with the price-difference between the two varieties ruling on the spot market at the time of delivery. This obligation practically invalidated the contract altogether as a hedge for Giza 7, since the amount of the bonification was virtually unpredictable for any appreciable period of time. The spot price of Fully-Good-Fair Giza 7, which was one of the determinants, represented sufficiently accurately the resultant of the equation of trade demand to supply, but the spot price of Fully-Good-Fair Sakellaridis, the other determinant could be manipulated to a practically unlimited extent owing to the restricted supply available.

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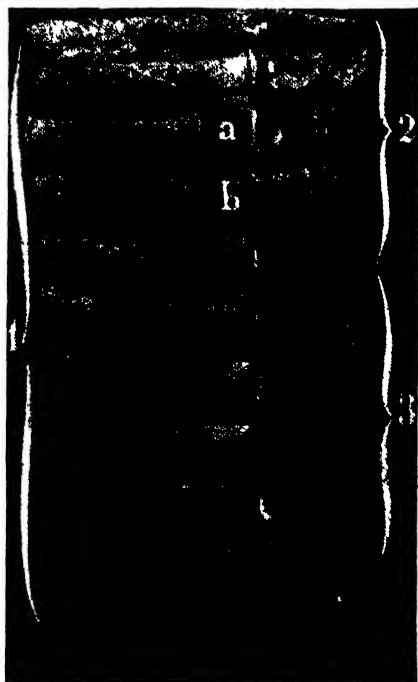
There are now three bases for cotton contracts, the two long-staple contracts being the Sakel and the Giza 7, with Ashmouni as the basis for short-stapled varieties."

MIXING OF VARIETIES.

We have received the following statement from the Alexandria Cotton Exporters' Association:—

"In accordance with Law 51 decreed in 1934 by the Egyptian Government to prevent the mixing of varieties of cotton, every steam-pressed bale must bear the name of the variety of its contents and the marking of same must be done under the supervision of a representative of the Ministry of Agriculture.

The marking of the said bales must be effected as follows during the cotton season 1936-37 (see photo):



1. The 'farch' (front side) of each bale must be covered with new, or used canvas, provided the latter is absolutely clean and free from any markings.

2. The spaces between the first five bands, either from the bottom or from the top of the bale, must be reserved exclusively for the Egyptian Government marks, which are as follows:—

(a) The name of variety, i.e., 'Sakel,' 'Maarad,' 'Ashmouni,' etc., etc.

(b) The word 'Agriculture,' abbreviated 'Agric,' preceded by a number indicating the pressing company.

3. The remainder of the 'farch' can be used for the private marks of shippers.

The ink for the Government marking must be 'Dark Blue,' indelible, so as to prevent the erasure of the actual marks or the substitution of new ones on arrival of cotton at port of discharge or transhipment.

Alexandria (Egypt), November, 1936."

H.E. AHMED ABDEL WAHAB PASHA

We learn from the Egyptian newspaper *l'Informateur*, that H.E. Ahmed Abdel Wahab Pasha has been offered the presidency of the Conseil d'Administration de la Salt and Soda. He has, moreover, been invited to join the Board of Administration of the National Bank of Egypt, and he has also assumed the office of Director General of the Société Misr d'Assurances Générales, a post which was formerly occupied by H.E. Dr. Hafez Afifi Pasha, Egyptian Ambassador in London.

We tender our congratulations to H.E. Ahmed Abdel Wahab Pasha on his appointment to these important positions.

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All enquiries should be addressed to the Head Office of the INTERNATIONAL COTTON FEDERATION, 26, Cross Street, Manchester, 2.

CROP REPORT

Messrs. Reinhart & Co., Alexandria, Egypt, communicate the following, dated January 22, 1937:—

Spot Market: Far Eastern spinners are again in the market for important quantities of Ashmouni/Zagora. Indian spinners show interest for Giza 7, but they are reluctant in following the advance of the market. The demand from Lancashire, French and Swiss spinners is sporadic only. Premiums of Giza 7, Ashmouni and Zagora remain stationary, whilst those of Sakellaridis and Maarad are somewhat firmer than a week ago.

According to information received from our up-country agencies, about three-quarters of the crop have been ginned prior to December 31, 1936, and there remains very little cotton in the hands of cultivators.

New Crop: The increasing discount of Ashmouni new crop futures below old crop contract is attracting the attention of spinners. Some business has already been booked in medium grades of Uppers/Zagora.

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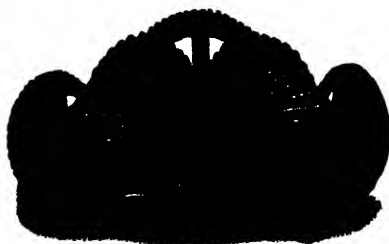
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Third Cotton Forecast, 1936-37.

This forecast is based upon reports furnished by the under-mentioned provinces and States, which practically comprise the entire cotton area of India. It deals with both early and late varieties of cotton and relates generally to conditions up to the beginning of December, 1936.

The total area sown amounts to 23,901,000 acres, as against 24,130,000 acres at this date last year, or a decrease of 1 per cent. The total estimated yield is 5,478,000 bales* of 400 lbs. each, as compared with 5,360,000 bales (revised) at the corresponding date last year, or an increase of 2 per cent.

The present condition of the crop, on the whole, appears to be fairly good.

The detailed figures for the provinces and States are shown below (the figures for the previous years are given in the appended statement):—

Provinces and States	Area Acres (thousands)	Outturn Bales of 400 lbs. each (thousands)	Yield per acre lbs.
†Bombay	5,428	1,093	81
Central Provinces and Berar	4,041	825	82
†Punjab	3,685	1,383	150
†Madras	1,982	412	83
†United Provinces	694	173	100
†Sind	962	423	176
Burma	500	109	87
†Bengal	75	26	139
Bihar	31	6	77
Assam	36	13	144
Ajmer-Merwara	34	12	141

* The total quantity of cotton pressed up to December 18, 1936, during the current season (as far as reported) is given in the Appendix to this forecast. The amount of loose (unpressed) cotton consumed in spinning mills in India during the months of September and October, 1936, amounted to 62,525 bales of 400 lbs. each (comprised of 48,908 bales in British India and 13,617 bales in Indian States). The quantity consumed in spinning mills in British India (as far as information was available) during the corresponding period of the preceding season was 23,717 bales. Other relevant statistics which throw light on production are also given in the Appendix.

† Including Indian States.

THIRD COTTON CROP FORECAST—*continued.*

THIRD COTTON CROP FORECAST—*continued.*

Provinces and States		Area		Outturn Bales of 400 lbs. each (thousands)	Yield per acre lbs.
		Acres (thousands)			
North-West Frontier Province	.. ..	19		4	84
Orissa .. ..	.. ..	16		1	67
Delhi .. ..	.. ..	2		1	160
Hyderabad .. ..	.. ..	3,025		493	65
Central India .. ..	.. ..	1,288		174	54
Baroda .. ..	.. ..	855		149	70
Gwalior .. ..	.. ..	619		94	61
Rajputana .. ..	.. ..	541		74	55
Mysore .. ..	.. ..	78		13	67
Total .. ..	.. ..	23,901		5,478	92

‡ Repeated from second forecast, later information not being available.

§ Provisional estimate.

On the basis of these figures, the average outturn per acre of the present crop for All-India works out at 92 lbs., as against 89 lbs. at this time last year.

A statement showing the present estimates of area and yield according to the recognized trade descriptions of cotton, as compared with those of the preceding year, is given below:—

Descriptions of cotton	Acres (thousands)		Bales of 400 lbs. each (thousands)	
	1936-37	1935-36	1936-37	1935-36
Oomras :				
Khandesh	1,274	1,284	267	282
Central India	1,907	1,864	268	294
Barsi and Nagar	1,935	2,401	340	437
Hyderabad-Gaorani	834	937	140	140
Berar	2,786	2,911	572	522
Central Provinces	1,255	1,318	253	224
Total	9,991	10,715	1,840	1,899
Dholleras	2,391	1,828	468	359
Bengal-Sind :				
United Provinces	694	597	173	196
Rajputana	575	*524	86	*95
Sind-Punjab	2,501	2,420	915	886
Others	43	43	9	9
Total	3,813	*3,584	1,183	*1,186
American :				
Punjab	1,638	1,445	664	587
Sind	529	372	232	150
Total	2,167	1,817	896	737
Broach	1,438	1,352	324	297
Coompta-Dharwars	1,087	1,288	165	184
Westerns and Northern	1,368	1,917	151	251
Cocanadas	152	155	26	27
Tinnevellies	311	344	80	*89
Salems	149	126	29	25
Cambodias	417	415	168	170
Comillas, Burmas and other sorts	617	*589	148	145
Grand total	23,901	24,130	5,478	*5,369

* Revised.

Indian Raw Cotton Statistics.

The Indian Central Cotton Committee have recently issued three statistical leaflets which contain (1) the consolidated results of the censuses made in 1935 and 1936 into stocks of Indian raw cotton held by the mills and the trade as of August 31; (2) a compilation of receipts at mills in India of raw cotton during the 1935-36 season; and (3) the results of enquiry made into the subject of total exports by sea of Indian raw cotton during the season 1935-36. The stock, receipts and exports figures have been classified into varieties with the help of different cotton trade organizations, mills, and shipping houses. The following table broadly summarizes the three leaflets:—

Trade Descriptions of cotton	(In 000's of bales of 400 lbs. each)					
	Receipts at mills in India during		Exports by sea during		Mill and Trade Stocks as on Aug. 31	
	1935-36	1934-35	1935-36	1934-35	1936	1935
Bengals	282	258	846	855	104	174
Oomras	492	431	1,064	926	193	231
Verum 262 and Hyderabad Gaorani	125	135	7	2	66	68
Americans	761	501	826	574	434	294
Broach	264	242	164	71	264	92
Dholleras	189	210	176	127	189	101
Southerns	417	458	183s	115	373	260
Others	22	19	90	178	9	12
Total Indian cotton	2,552	2,254	3,356	1,648	1,632	1,232
American	25	64	—	—	10	32
Egyptians	72	123	—	—	19	30
East Africans	234	212	—	—	44	59
Others	22	33	—	—	6	12
Total Foreign cottons	353	432	—	—	79	133
Grand Total	2,905	2,686	—	—	—	—

On the basis of export statistics prepared by the Indian Central Cotton Committee for the season 1935-36 the percentage of exports occupied by prominent groups of Indian cotton varieties to total Indian exports works out as under:—

Exports of	1935-36 Per cent of Total	Of which to			Total Per cent.
		Japan Per cent.	U.K. Per cent.	Others Per cent.	
Bengals	25.2	38.2	15.6	46.2	100
Oomras	31.7	72.7	5.3	22.0	100
Verum and Hyderabad Gaorani	0.2	85.7	14.3	—	100
Americans	24.6	52.0	22.8	25.2	100
Broach	4.9	49.0	12.2	38.8	100
Dholleras	5.2	64.2	—	35.8	100
Southerns	5.5	53.5	10.4	36.1	100
Others	2.7	14.4	15.5	70.1	100
Total	100.0	54.8	15.9	29.3	100

(The Financial News.)

A NEW METHOD AND APPARATUS FOR DETERMINING THE AVERAGE LENGTH AND FINENESS OF COTTON HAIRS.

*By Dr. NAZIR AHMAD, M.Sc., Ph.D., F.Inst.P., and
C. NANJUNDAYYA, M.Sc., (Published by the Indian
Central Cotton Committee Technological Laboratory,
Technological Bulletin, Series B, No. 21. Price: As.8.)*

A review of the previous work done on the relationship between the fibre properties and the spinning value of a cotton indicates that the two properties which contribute mostly to the spinning quality are the mean length and the weight per unit length. Consequently, rapid and accurate methods of determining these two properties should be of immense value, not only to the cotton breeder but also to the trade and industry. Several methods which are in vogue are briefly reviewed; of these the weight-ratio methods are examined in greater detail in the present paper.

It is shown that the prevalent weight-ratio methods involve the assumption that the variation of weight along the length of a fibre is negligible. This assumption has been found to be invalid by the recent work carried out at the Technological Laboratory, and it is shown that if this wrong assumption is made the average length as found by the weight-ratio method is bound to be considerably less than the correct value.

A new method, which remedies the above defect, is described in this paper. The essential features of this method consist in cutting a representative tuft of fibres, with one end in alignment, into three parts; the first part extending to a known length from the aligned end, the second part also having a known length, and the third part containing fibres of different lengths. The three parts are separately weighed. The average length of the third portion is computed by multiplying the ratio of the weight of the third part to that of the first by the known length of the first part. The average length of the whole tuft is obtained by adding up the individual lengths of the three parts. Furthermore, the fibre weight per unit length may also be determined by counting the number of fibres in the first section prior to weighing and dividing

the weight of the tuft by the number of fibres and the average length.

An apparatus, which is designed to carry out the tests accurately and rapidly, is described in this paper. The results of average length determined with the help of this apparatus are given along with those obtained by the older methods, and the agreement is found to be very satisfactory.

SMALL LEAF DISEASE IN COTTON.

A peculiar disease in cotton which manifests itself in the reduced size of the leaves and sterility of the plant has long since been recorded in the Bombay Presidency. The Indian Central Cotton Committee has recently issued a pamphlet, Reprint No. 11, entitled "Preliminary Observations on Small Leaf Disease in Cotton," dealing with this subject.

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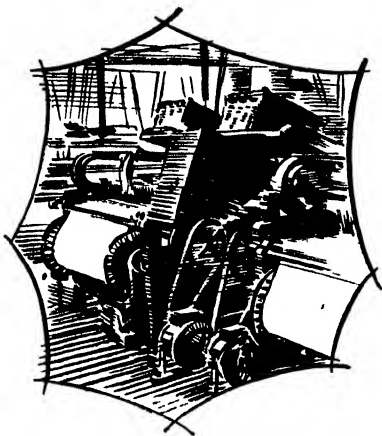
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Technical Section

Random Slubbing.

Messrs. Platt Bros. & Co. Ltd., of Oldham, have recently introduced what is termed the Ball Slub Motion for Random Slubbing. This attachment can be applied to almost any pattern of ring-spinning frame without alteration to the existing machinery.

The following is extracted from the November-December, 1936, issue of "Platt's Bulletin":—

The main part of the motion is fixed at the out-end of the frame, being carried by a main supporting bracket bolted to the frame end.

The out-end length of front roller and the out-end length of back roller require to be lengthened for the provision of pinions A, M and K. (Fig. 1.)

The front line has two pinions A and M; A driving through a compound carrier B C to a plate wheel D.

C is a change wheel used for the purpose of altering the speed of the plate wheel D.

M drives through a compound carrier N and O, to a back roller pinion K; this pinion being one-half of a moving catch box. O, in this case, is a change pinion and is used for the purpose of altering the speed to the back



FIG. 1

roller, which in turn regulates the density of the accelerated portion of roving.

Bolted with two bolts on to the plate wheel D is a 24T ratchet wheel F, and the ball casing G. The ball casing is divided into $1/12$ ths at a fixed radius to the plate wheel stud Q and contains eleven holes as shown. The distance between No. 11 and No. 1 being $2/12$ ths of the 12 divisions (Fig. 3). The ratchet wheel F is provided with spaces which are the same distance from the centre as the ball holes and which are irregular in length (vide dotted lines in Fig. 3). Between each two spaces is a solid portion of the ratchet wheel which is for the purpose of lifting the steel balls.

The pawl H drops down a cut-away portion P of the ball casing at every one revolution of the plate wheel, and connects with a tooth of the ratchet wheel. The revolving ratchet wheel is held for the space of one tooth so that the solid portions and spaces in the ratchet surface change their position relative to the balls, thus lifting a fresh series of balls above the surface of the ball casing and dropping others.

The balls project a matter of $\frac{3}{16}$ in. The projecting balls during the revolution come into contact with a lever I which is fastened to a stud.

The fork bracket into the pinion half of the catch box is also fastened on the same stud. When the lever I is pressed outwards the fork J pushes the pinion half of the catch box K into gear with the fixed half of the catch box L, and drives the back roller at the speed transmitted through the wheels M, N, O, and accelerates the back and middle roller at a pre-determined speed.

At the gearing end of the frame the standard back roller wheel is taken off and a new wheel is fitted with the same number of teeth and the same pitch and bore, but this wheel is arranged as a free wheel back roller wheel, and allows free and smooth acceleration to the back and middle roller.

Referring again to the ratchet wheel F which has 24T, on the outer surface, and obtains the movement of one tooth by means of the pawl H during every revolution of the plate wheel, but in the opposite direction, it is apparent that the pattern of the slub sequence is entirely controlled by the spacings on the face of this wheel.

The standard ratchet with a random space arrangement (Fig. 3), gives the following relationship between slubs when only one ball is used in the ball casing.

Using ball No. 11 only and starting with the operating lever in the position shown in Fig. 3, the following numbers are the revolutions of the plate wheel before the ball appears and operates the

Arrow indicates position of spindle.
Arrow in mesh in drawing.

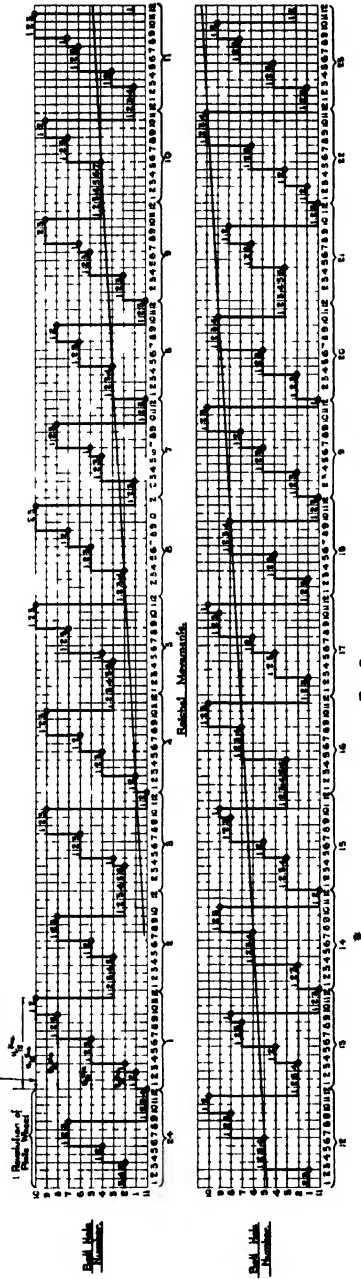


Fig. 2.

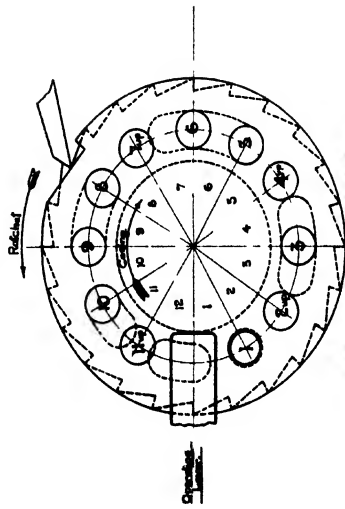


Diagram showing pattern wheel
position after completing the 12
measurement.

Fig. 3.

CHART FOR CALCULATING DISTANCES BETWEEN
SLUBS WHEN USING STANDARD RATCHET
PATTERN WHEEL AND STARTING WITH THE
OPERATING LEVER IN THE POSITION SHOWN
IN FIG. 3.

lever I: 3.4.1.5.1.4.1.2.3, and followed by this sequence again. These numbers total 24 (i.e., one revolution of the ratchet).

Assuming the diameter of the front roller to be 1 in., and the amount of yarn delivered at each revolution of the plate wheel D to be 44 ins., then the figures originally given when using one ball will be as follows:—

3	revolutions at 44 in.	per revolution	=	132 in.
4	"	44 "	"	= 176 in.
1	"	44 "	"	= 44 in.
5	"	44 "	"	= 220 in.
1	"	44 "	"	= 44 in.
4	"	44 "	"	= 176 in.
1	"	44 "	"	= 44 in.
2	"	44 "	"	= 88 in.
3	"	44 "	"	= 132 in.
24 revolutions				= 1,056 in., divided by 12 = 88 ft., repeat.

A large number of different patterns can be obtained by using the steel balls in various holes from one to eleven.

New ratchet wheels can be made to give many different distances of slubs, for instance, if only two spaces were used in the plate wheel and each space covered five holes of the ball casing, then it would be possible to obtain only two slubs during every 24 revolutions of the plate wheel, when one ball was in use. This may mean that anything up to 480 ins. distances between the slubs may be obtained. If repeat patterns for every one revolution of the plate wheel are required, then the pawl H can be kept out of action.

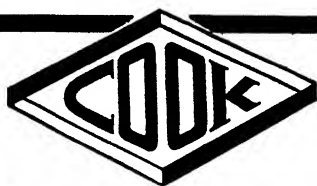
A New Check Loom.

Messrs. Hacking & Co. Ltd., of Bury, are now building an interesting type of check loom.

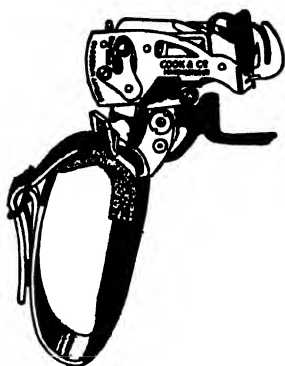
The Swiss type of drop box loom motion is quite well known, and has been made in a modified form for many years. The special feature of a recent loom with this motion is that there are four drop boxes at both sides of the loom, controlled by one pattern chain, and in combination with this there is a pick-at-will motion designed to deliver a single pick from either side of the loom as required. To permit this, there must be a fresh selection of shuttle boxes for every pick, instead of every two picks, as in an ordinary box loom with a single shuttle box at one side of the loom. For this reason the drive to the second motion shaft is arranged so that the latter rotates at the same speed as the crank shaft. Its special feature is the use of two eccentrics, one having a throw of two boxes and the other a throw of one box.

The mechanism is adapted to bring any box to sley level when required, irrespective of its previous position. This is an important feature in box motions, as it not only conduces to greater ease in building the pattern chain for the box movements, but simplifies the running of the loom and gives rise to fewer errors in checking.

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There are four upright operating hooks, each formed with a hook that can be engaged by a griffe that lifts every pick. A new pattern card is also presented every pick, the pattern chain being adapted to work in conjunction with horizontal needles, one for each hook. A blank in a card presses back the upright hook so that the griffe misses it on its upward movement. A hole in a card causes the corresponding upright hook to be lifted by the griffe. The lower ends of the upright hooks work in conjunction with T-shaped levers, from the horizontal arms of which depend chains which are attached to and partly encircle two barrels. Movements are clockwise and anti-clockwise, the net effect being to turn two eccentrics which raise or lower the shuttle boxes as indicated by the box pattern chain, so that a lift of a hook can either lift or drop a box or more, and each of the four levers always brings the same change. A hole in a card causes a box change, all blanks allow the boxes to remain unchanged.

The shuttle boxes at both sides of the loom are connected on the counterpoise principle, and as the boxes at one side are lifted they fall at the other side and vice versa. This not only saves power, but more easily overcomes inertia at starting and ensures freedom from jerks.

With the addition of a pick-at-will motion to Swiss drop boxes the loom is adapted for weaving a greatly increased variety of work embracing practically all kinds of checks, and many special classes of fabrics in which there is periodical insertion of one or more wefts of differing colour or character. In addition it provides for the most thorough weft mixing with the same kind of weft, by the single pick method if desired; and even provides for mixing more than one kind of weft. The device is also readily adaptable with a card saving motion.

The picking arrangement is a true pick-at-will motion, that is, one or more picks can be delivered in succession from either side of the loom as required. The motion is pattern controlled from the same chain as that for controlling the shuttle boxes. For this purpose an extra or fifth needle is provided in the needle-box. This actuates an extra upright lever that controls the movement of a small plunger adapted to enter the track of a slot in the boss of a disc slidably mounted on the crank shaft. Through appropriate lever connections a pull is exercised on a coupling that causes the picking tappet to make the pick from the side required. There are two picking tappets, one at each side of the loom, and these are connected together and adapted to slide in and out of the path of the cone bowl. When one is in position to make a pick, the other is out of position, so that there is no risk of picking from the wrong side, nor can both sides pick at the same time.

The W.T.R. High-Drafting System.

The Meynell W.T.R. High Drafting System, like most other high drafting systems, has its relative merits and demerits, but there is no doubt that as regards simplicity and freedom from

cumbersome parts it stands supreme, and is taken to by workers and employers alike once its principles are grasped.

Briefly speaking, it consists of a roller of special construction, by fine washers, which can be applied to the ordinary three-line roller system of drafting in place of the second top roller. It can be applied with little or no alteration to the already existing parts, this alone giving it a great advantage over any other type of high drafting system, and when one considers that no extra power is required in the driving of the machine, careful consideration must be given before passing any remarks of condemnation on it.

The roller consists of a central spindle on which is threaded a number of fine metal washers. Due to the particular method of mounting, these washers are allowed to move both laterally and vertically on the spindle, the amount of such movement, of course, being very small in order that the fibres will not be drawn through in an uncontrolled way. It is claimed for this system that, owing to the peculiar construction of the roller, there is a more positive control of the short floating fibres, the washers rising and falling with the bulk of the material passing through, which makes it particularly good for coarse counts. Tests taken by the writer on the Meynell W.T.R. method of drafting, when compared with the ordinary three-line system and the ordinary four-line system of drafting, are shown in the following table:—

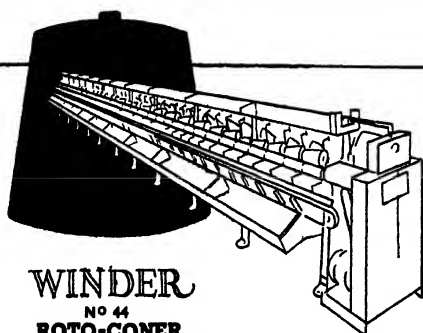
Counts spun 50's. Staple $1\frac{1}{8}$ in. T.P.I. 24·6 "Spindle speed 9,200. Hank roving.
Three line ordinary 10 hank double. W.T.R. 7·4 hank double.

Three line (ordinary drafting)			Meynell W.T.R.		
Counts	Strength	Product	Counts	Strength	Product
50	39		50	37	
50	40		50	39	
47·6	42		52·7	40	
50	41		52	40·5	
Av. 49·4	40·5	1,999	Av. 51·15	39·12	1,999
50	41		50	41·5	
50	40		50	39·5	
50	40		50	42·5	
50	38·5		50·7	42	
Av. 50·2	39·6	1,987	Av. 50·2	41·37	2,076

Several more tests were taken, and the average of all the count strength product was: Ordinary three-line, 2,007; W.T.R., 2,036. This gave a percentage increase in favour of the W.T.R. of approximately 1.09 per cent. As a further means of comparison, a series of tests were taken with the ordinary four-line system of high drafting and the W.T.R., the results being tabulated below.

The final results of several more tests were as follows, the product only being shown in order to save space: W.T.R. average product, 1,693; ordinary, four-line average product, 1,683.

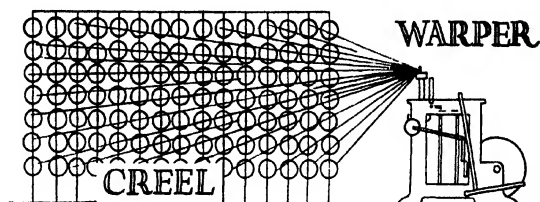
It can be seen that there is very little difference in the final results. It must be borne in mind, however, that for the conversion of any three-line system to high drafting, the advantages are in favour of the Meynell W.T.R., due to the lower conversion cost



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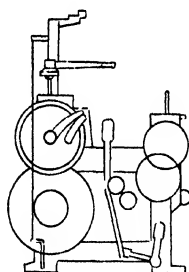
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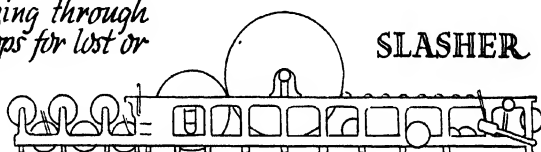
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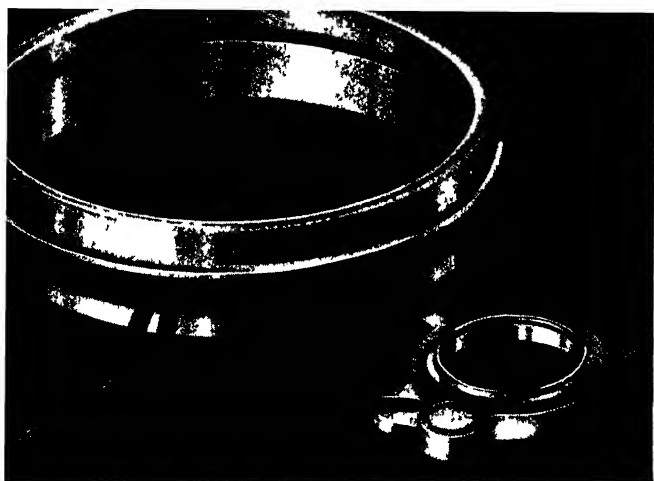
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and the freedom from extra working parts. The spinning in the above tests was normal, as was the regularity.

Counts spun 32's. Staple 1 in. Hank roving 4·4 double. Spindle speed 9,000 r.p.m. Calculated draft 15·4

Four line system			W.T.R.		
Counts	Strength	Product	Counts	Strength	Product
31·7	50		31	52	
31·7	49		31	53	
30·7	54		31·6	53	
30·7	55		31·6	54	
Av. 31·2	52	1,622	Av. 31·3	53	1,658
30·2	55		31·2	54	
31	54		32	52	
30	55		32	53	
30	55		32	52	
Av. 30·4	54·7	1,662	Av. 32·4	52·75	1,689

Irregularity of Cotton Yarns.

By Dr. A. J. TURNER (of the Shirley Institute.)*

I am convinced that no other property of cotton yarns is fundamentally of such great interest and importance as irregularity. Irregularity raises its head in a number of ways—in the appearance and strength of yarns, and of woven and knitted fabrics. I need only mention such fabrics as poplins, limbrics, and satins, and all classes of knitted fabrics to remind you that some types of irregularity are immediately apparent to the eye. With this visual irregularity are usually associated irregularities in the weights of short lengths of yarn, and in the twist and strength. It is not surprising, therefore, that one of the most important subjects of research at the Shirley Institute is that devoted to discovering the causes of irregularity with a view to removing them. Many advantages would follow from the production of more regular yarns. The same cotton could be spun to higher counts, or alternatively the same counts could be obtained from a cheaper cotton; the improvement could be used in yet another way, by employing a lower twist to obtain the same strength. Moreover, these more regular yarns would lead to improvements in the lustre of folded yarns and in the finish of fabrics made from them.

As already pointed out, we are especially conscious of irregularity when it appears in those fabrics which we expect to be distinguished by their charm of beauty or magic of surprise, besides their cardinal virtue of utility. My own attention was directed to the importance of irregularity some 20 years ago in the course of an

* In a lecture before the Ashton-under-Lyne and District Mill Managers' Association, December 4, 1936, arranged jointly with the Lancashire Section of the Textile Institute.

investigation of the tearing strength of fabrics. I then discovered what, I suppose, has been familiar to housewives for generations—that linen fabrics are much more difficult to tear than cotton ones. This is one great reason why linen fabrics have long been preferred to cotton for covering the wings of aeroplanes. A most important fact emerged from these experiments, namely, that linen resisted tearing better, partly because its yarns were more irregular than those of cotton—not that irregularity is to be regarded as desirable even in this case. The results of these experiments I epitomized in my statement that tensile tests really measure the strength of the weak places in the yarns and tearing tests that of the strong places. A closer examination showed that even cotton yarns and fabrics were not altogether free from irregularities. In a lecture in 1920 I discussed various forms of irregularity and explained how the form and degree of irregularity could be investigated in a simple fashion by repeated testing of different lengths of specimen. This method was used in the final elucidation of the most mysterious case of fabric testing I ever remember encountering.

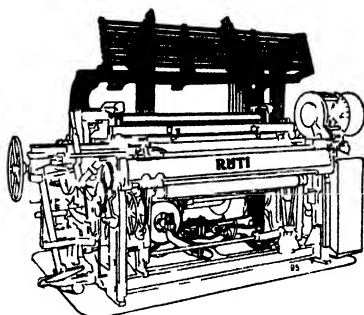
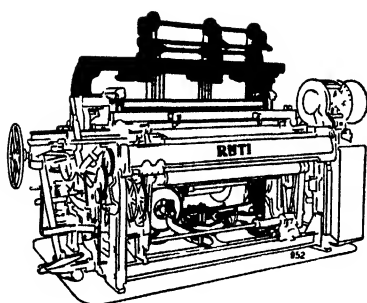
This was a 3-oz. fabric having the same number of threads per inch, the same strength, and the same extensibility in both directions, warp and weft, yet the warp gave an appreciably higher value for tearing strength than the weft. The results were confirmed by a repetition of the tests. Closer investigation showed that the individual yarns had also the same counts and the same twist; but when these yarns were tested for strength in different specimen lengths it soon became apparent that although the yarn strengths were the same for 18-in. lengths, in shorter lengths the warp strength was decidedly higher, showing that the warp was in fact much less regular than the weft. Thus the mystery was completely explained.

The lecturer then proceeded to classify the different types of irregularity in cotton yarns into:—

- (a) General count variation, familiar to spinners and manufacturers alike; and
- (b) Special types of variation, sub-divided into:—
 - (i) General irregularity in short lengths, non-periodic.
 - (ii) The drafting wave, causing nearly periodic irregularity in short lengths; and
 - (iii) Strictly periodic irregularity due to various machinery imperfections.

Experiments strongly suggested that the chief source of yarn irregularities is to be sought in the very invention that caused cotton spinning to be a commercial success, namely, drafting by rollers. It is the irony of fate that this success was thus purchased at so high a price for each process of drafting introduces numberless periodic irregularities; it is these that make it necessary to use the highest class cottons in spinning fine counts; no such restriction was known to the early Indian hand spinner, who could and did spin yarn of about 200's counts for Dacca muslins from cotton which could not be spun economically into 20's by machinery at the present day.

The remainder of the lecture was largely devoted to a con-



Do you notice the difference in your shed ?

Background : The shadow-casting tall loom with superstructure and harness suspension in the centre with all its disadvantages.

Foreground : *The new Ruti loom with low frame*, without any superstructure ; the shafts are suspended at the side (patented).

This comparison shows plainly the important improvement : *The astonishing simplification !*
The view in the shed is now free and unobstructed • both natural and artificial illumination are improved • also the control of the warp • the shafts are easier to deal with.

The output is raised • the goods are improved in appearance.

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One and multi-shuttle automatic looms. Dobbies and Jacquard machines.

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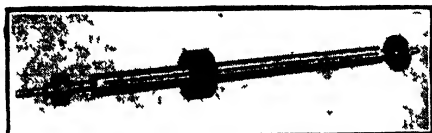
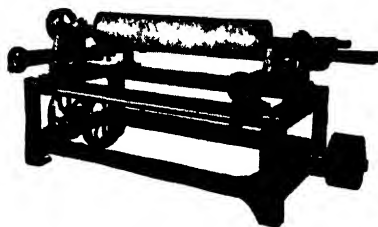
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Card Grinding Machinists ROCHDALE

Makers of Machinery for Grinding Cotton, Wadding, Waste and Woollen Cards



TRAVERSE GRINDER



LONG ROLLER

Patent High-speed Differential Motions for Quick Traversing Grinders.
Roller-bearings and Noiseless.

Patent Plough-grinder for Repointing Old Card Wire.

Grinding Frames for Roller and Clearer Cards.

Precision Gauges to ensure Correct Setting.

Improved Flexible Emery Fillet. Stripping and Burnishing Brushes.

When ordering indent Wareing's Patents

sideration of the types of irregularity arising from the drafting wave and machinery imperfections.

Dr. Turner showed many interesting illustrative exhibits of imperfection in yarns and fabrics due to these causes, and with the help of numerous lantern slides, described in detail how the mode of their causation had been detected, and in most cases a cure effected.

(Textile Weekly, Manchester.)

IMPROVED WINDING ATTACHMENT.

On precision winding machines there are certain advantages to be obtained from winding more than one package per spindle, where the traverse of the package permits. The principal advantage is, of course, the increase in the production per spindle, whilst another is that the capital outlay on, say, a six-spindle machine fitted to wind two packages per spindle is not nearly so much as it would be if two machines winding one package per spindle were employed.

These advantages are still greater where a machine can be fitted to wind three packages per spindle, and it is interesting to know that the Universal Winding Co. have recently introduced a three-cop attachment to their No. 150 winding machine. This machine was introduced to the trade only about three years ago and has proved exceedingly successful for winding threads and small cords of various kinds. It is a precision winder similar to this firm's well-known No. 50 machine, but is of more robust construction, and has been improved and strengthened specially to provide firm solid packages with absolutely accurate "lay" of the threads.

The three-cop attachment consists of a traverse bar carrying three guides, and of course, three sets of supply parts, including tensions, slub-catchers, and stop motions for thread breakages. In addition, unless the bore of the tube is relatively large, which is not unusually the case, an outer spindle support is employed. By using this support, spindles of smaller diameter may be employed without risk of their becoming strained through the tensions and pressures which require to be applied in winding threads. The support is fitted with ball bearings for the spindle, and is readily moved aside for doffing and as readily returned to running position after the empty tubes have been placed on the spindle.

The traverse limit for three-cop winding on the No. 150 machine is $2\frac{1}{2}$ ins. The three-cop mechanism, with outer spindle support, can also be applied to the No. 50 machine, where the traverse limit is 2 in.

The Universal Winding Co., we are informed, would be pleased to provide further details of their two-cop or three-cop attachments on application. Yardage counters or measuring devices are usually used with these attachments for automatically stopping the spindle when a pre-determined length has been wound. Since only one such counter is required to each spindle, there is a further saving in first cost expenditure where three packages are wound per spindle.

(Textile Weekly, Manchester.)

COTTON TRADE STATISTICS

UNITED KINGDOM.

YARN EXPORTS.

Twelve months ended December 31

	1934 lbs.	1935 lbs.	1936 lbs.
British West Africa	840,800	1,475,100	1,912,300
British India :			
Bombay via Karachi	234,600	233,100	282,200
" " other ports	1,871,700	2,335,900	1,890,900
" (total)	2,106,300	2,569,000	2,173,100
Madras	3,687,300	3,895,900	2,996,400
Bengal, Assam, Bihar and Orissa	2,968,600	3,744,600	3,018,400
Burma	532,700	434,600	426,500
Total (British India)	9,294,900	10,644,100	8,614,400
Hong Kong	1,300,700	1,182,700	1,559,200
Australia	5,630,100	5,606,500	5,441,700
Canada	4,097,100	4,545,700	4,458,100
Other British countries	6,149,000	8,534,700	10,312,300
Finland	788,600	937,400	1,208,100
Sweden	5,355,400	5,356,200	6,174,600
Norway	4,590,100	4,272,700	5,569,300
Denmark	3,445,700	3,563,300	4,375,700
Poland	1,482,000	1,984,700	2,586,500
Germany	19,073,700	30,258,300	32,717,000
Netherlands	14,446,300	15,192,300	18,266,800
Belgium	4,408,900	5,265,300	5,219,300
France	428,800	569,700	869,700
Switzerland	4,862,600	4,683,600	4,008,800
Italy	259,000	212,600	3,500
Austria	778,300	855,700	1,380,100
Czechoslovakia	2,090,600	1,239,100	858,000
Yugoslavia	2,404,900	2,842,100	2,644,000
Greece	901,500	823,700	895,900
Bulgaria	1,025,600	450,200	704,500
Roumania	10,901,000	4,026,600	6,767,300
Turkey	1,146,900	1,447,900	1,074,400
China	915,600	467,600	527,400
Japan	1,309,300	1,281,900	952,900
United States of America	1,426,100	1,855,400	1,613,800
Brazil	2,845,200	2,338,200	1,842,700
Argentine Republic	7,933,100	8,418,600	6,009,000
Other foreign countries	10,295,800	11,342,700	12,367,900
Counts {			
Up to 40's	74,169,300	81,454,200	91,369,300
Over 40's up to 80's	38,336,900	41,648,100	41,153,800
Over 80's up to 120's	15,916,000	16,249,200	16,250,200
Over 120's	2,005,400	2,323,100	2,161,900

YARN EXPORTS (England)—*continued*.

			1934	1935	1936
			lbs.	lbs.	lbs.
Grey, unbleached	..	..	114,311,800	124,210,800	132,741,200
Bleached and dyed :					
Mercerised	..	..	6,483,800	6,838,300	7,464,700
Not mercerised	..	..	9,632,000	10,625,500	10,729,300

CLOTH EXPORTS.

Twelve months ended December 31

	1934 sq. yds. (in 1,000's)	1935 sq. yds. (in 1,000's)	1936 sq. yds. (in 1,000's)
Irish Free State	40,761	43,722	39,686
British West Africa	68,000	164,387	198,803
Union of South Africa	121,098	118,124	121,113
Southern Rhodesia	8,178	11,582	10,902
British East Africa	8,487	10,012	7,063
Anglo-Egyptian Sudan	3,949	3,334	2,617
Aden and Dependencies	2,936	3,703	3,597
British India :			
Bombay via Karachi	183,248	171,802	147,087
" " other ports	142,817	134,398	111,760
" (total)	326,065	306,200	258,847
Madras	59,385	56,439	36,014
Bengal, Assam, Bihar and Orissa	161,203	138,804	96,010
Burma	36,114	41,534	25,510
Total (British India)	582,767	542,977	416,381
British Malaya	28,471	29,575	34,189
Ceylon	12,327	29,008	31,909
Hong Kong	5,446	5,808	3,035
Australia	141,592	118,348	123,688
New Zealand	36,185	36,437	35,127
Canada	63,822	59,890	73,725
British West India Islands	22,253	34,937	30,529
British Guiana	4,706	6,941	6,273
Other British countries	16,949	23,671	17,816
Finland	7,044	6,793	7,186
Latvia	2,542	3,040	3,753
Sweden	25,348	20,111	22,066
Norway	18,379	18,513	20,118
Denmark	50,012	46,450	52,557
Germany	22,827	21,852	34,044
Netherlands	18,744	20,494	23,339
Belgium	10,634	11,535	9,705
France	2,932	2,628	2,553
Switzerland	55,953	32,494	35,727
Portugal	4,227	3,621	3,120
Spain	663	615	292
Italy	3,781	2,250	446
Austria	4,145	3,886	3,421
Yugoslavia	4,848	4,637	3,653
Greece	26,892	27,451	25,348
Roumania	11,332	5,289	2,151
Turkey	13,914	14,734	11,624
Syria	4,479	5,579	4,527
Egypt	43,567	35,668	64,341
Spanish ports in North Africa	3,213	1,931	265
Morocco	18,299	10,808	4,653

CLOTH EXPORTS (England)—*continued.*

	1934	1935	1936
	sq. yds. (in 1,000's)	sq. yds. (in 1,000's)	sq. yds. (in 1,000's)
French West and Equatorial Africa ..	30,313	30,936	41,578
Belgian Congo	9,965	12,074	5,912
Portugese East Africa	5,214	7,243	6,895
Iraq	12,923	9,265	5,419
Iran	5,018	5,746	12,600
Dutch East Indies	14,515	10,308	27,203
Philippine Islands	3,540	2,763	2,932
Siam	3,568	3,267	1,660
China	14,531	8,425	4,725
Japan	1,316	1,380	1,098
United States of America	11,061	9,727	12,955
Cuba	15,419	9,101	12,325
Mexico	2,618	3,005	3,926
Colombia	44,947	40,454	61,177
Venezuela	21,953	23,961	22,556
Ecuador	2,336	2,547	1,816
Peru	10,713	7,151	10,709
Chile	18,726	16,854	13,344
Brazil	2,926	1,167	1,807
Uruguay	15,448	11,202	11,266
Argentine Republic	161,341	134,212	115,830
Other foreign countries	63,427	54,908	47,677
Grey, unbleached	359,428	329,013	315,674
Bleached	614,725	611,262	602,334
Printed :			
Cretonnes and chintzes	5,637	5,787	6,898
Other sorts	392,425	411,122	392,788
Dyed in the piece :			
Pile fabrics	3,310	3,348	2,786
Other sorts	533,441	490,157	492,492
Manufactured of dyed yarn :			
Damasks, tapestries, brocades and the like	84,554	531	385
Other sorts		97,211	103,395

FRANZ EMIL EGGERICHS**HAMBURG 8****GR. REICHENSTR. 51***Cable Address : "AGILE"**Telephone : 312620-312621**Codes : A.B.C. 6th, Bentley, Bunting 1st, Meyer's 39th, Shepperson's 1881***COTTON OF ALL GROWTHS****East Indians and Outside Growths a Speciality****Waste : Futures : Linters : Valuations : Reports****Expert Umpire***Correspondence solicited from Buyers and Sellers.**Trading since 1898*

ENGLAND—continued.

COTTON YARN AND CLOTH EXPORTS

		Yarn		Cloth	
		lbs.	£	Linear yds.	£
1913	..	210,099,000	15,006,291	7,075,252,000	97,775,855
1914	..	178,527,800	11,973,956	5,735,854,700	79,182,763
1915	..	188,178,700	10,312,934	4,748,904,600	64,702,574
1916	..	172,192,800	13,432,761	5,255,503,900	88,793,778
1917	..	133,153,480	16,708,035	4,979,076,900	112,787,619
1918	..	101,793,700	21,409,710	3,695,772,100	138,521,491
1919	..	162,665,500	33,911,554	3,528,756,500	178,955,943
1920	..	147,432,400	47,585,814	4,760,000,000	315,717,631
1921	..	145,894,900	23,924,879	3,038,246,200	137,132,298
1922	..	201,953,000	26,474,623	4,312,667,000	142,436,751
1923	..	145,017,400	21,010,689	4,323,865,600	138,251,864
1924	..	163,056,400	27,782,126	4,585,096,400	153,448,106
1925	..	189,531,200	30,501,416	4,636,720,200	150,627,835
1926	..	168,526,800	21,781,178	3,922,796,700	116,052,953
1927	..	200,464,700	23,608,368	4,189,109,600	109,995,715
1928	..	169,206,900	22,566,494	3,968,198,300	107,298,462
1929	..	166,637,700	20,753,279	3,764,852,400	99,263,987
1930	..	136,987,500	14,469,350	2,490,549,400	61,305,421
1931	..	133,516,300	10,895,216	1,790,233,800	37,327,672
1932	..	141,463,100	10,419,740	2,302,687,300	43,614,893
1933	..	135,111,400	10,075,995	2,116,720,000	40,234,252
1934	..	130,425,700	10,236,383	2,067,471,000	39,821,860
1935	..	141,674,600	11,161,702	2,013,429,000	39,531,954
1936	..	150,935,200	11,851,180	1,993,667,000	40,328,229

AVERAGE PRICES FOR YARN AND CLOTH EXPORTS

(Compiled from Board of Trade Returns)

				Yarn		Cloth	
				per lb.	taking 1913 as 100	per lin. yd.	taking 1913 as 100
1913	..	..	..	17.141	100.0	3.316	100.00
1914	..	..	..	16.096	93.90	3.313	99.90
1915	..	..	..	13.152	76.72	3.269	98.58
1916	..	..	..	18.722	109.22	4.054	122.25
1917	..	..	..	30.115	175.68	5.436	163.93
1918	..	..	..	50.477	294.48	8.995	271.26
1919	..	..	..	50.033	291.89	12.171	367.03
1920	..	..	..	77.463	451.91	15.918	480.03
1921	..	..	..	39.356	229.60	10.832	326.65
1922	..	..	..	31.462	183.54	7.926	392.03
1923	..	..	..	34.772	202.85	7.673	231.39
1924	..	..	..	40.892	238.56	8.032	242.21
1925	..	..	..	38.623	225.32	7.796	235.10
1926	..	..	..	31.018	180.95	7.100	214.11
1927	..	..	..	28.264	164.89	6.301	190.01
1928	..	..	..	32.007	186.72	6.489	195.68
1929	..	..	..	29.889	174.37	6.327	190.80
1930	..	..	..	25.350	147.89	5.907	178.13
1931	..	..	..	19.584	114.25	5.063	150.87
1932	..	..	..	17.670	103.08	4.545	137.06
1933	..	..	..	17.897	104.41	4.562	137.58
1934	..	..	..	18.836	109.88	4.622	139.38
1935	..	..	..	18.91		4.71	
1936	..	..	..	18.84		4.85	

TISSUES OF ARTIFICIAL SILK (INCLUDING STAPLE FIBRE AND WASTE) MIXED WITH OTHER MATERIALS, EXCEPT SILK.

	1934	1935	1936
	sq. yds.	sq. yds.	sq. yds.
Irish Free State	4,023,776	2,766,982	2,640,002
Union of South Africa .. .	7,218,168	6,040,586	8,401,492
British India	8,871,685	4,990,101	2,447,959
Australia	7,053,660	4,417,577	6,009,660
New Zealand	2,791,494	2,003,630	2,101,512
Canada	3,412,809	1,368,336	1,808,178
Other British countries .. .	4,274,647	6,666,357	8,530,167
Denmark	2,527,676	2,006,401	2,387,065
Netherlands	1,352,882	748,202	659,979
Argentine Republic	1,464,339	1,129,010	1,032,987
Other Foreign countries .. .	6,282,611	4,724,986	5,784,937

	1934		1935		1936	
	12 months ended December 31 lbs	£	12 months ended December 31 lbs	£	12 months ended December 31 lbs	£
Yarn, thread and straw wholly of artificial silk or of artificial silk mixed with other materials						
Singles yarn and straw	9,258,016	880,100	9,030,000	700,386	7,563,003	609,641
Doubled or twisted thread advanced beyond the stage of singles yarn . .	1,884,930	131,183	767,561	85,594	481,363	67,538
	sq yds.	£	sq yds.	£	sq yds.	£
Manufactures, except apparel and embroidery—Tissues wholly of artificial silk (including staple fibre and waste)						
—Piece goods	16,035,082	1,022,475	14,945,525	966,818	25,002,242	1,425,162
	lbs	£	lbs	£	lbs	£
All other descriptions	22,104	9,637	27,367	10,801	31,013	12,401

**JAPANESE EXPORTS OF TEXTILES FOR SIX MONTHS
ENDED JUNE, 1936.**

	Six months ended June, 1936		Six months ended June, 1935	
	Quantity sq. yds.	Value Yen	Quantity sq. yds.	Value Yen
Various grey cotton tissues	491,178,737	71,458,159	452,698,019	71,746,378
Ditto, bleached	264,241,780	42,179,163	292,802,087	50,129,246
Other cotton tissues ..	578,610,567	115,779,702	643,406,802	134,568,339
Woolen tissues including cotton mixtures	15,251,962	19,339,604	11,630,830	13,553,248
Silk tissues including cotton mixtures	57,032,375	32,077,514	66,175,430	39,359,394
Rayon tissues, including mixed tissues	257,653,089	72,131,410	203,534,194	65,395,591
Other textile manufactures	—	50,756,888	—	46,463,606
Total	—	403,722,440	—	421,215,802

INDIA.

Detailed statements showing the quantity (in pounds) and the counts (or numbers) of yarn spun, and the quantity (in pounds) and their equivalent (in yards) and description of woven goods manufactured in India (British India and Indian States):—

DETAILED STATEMENT OF THE QUANTITY (IN POUNDS) AND THE COUNT (OR NUMBERS) OF YARN SPUN.

GRAND TOTAL, INDIA (BRITISH INDIA AND INDIAN STATES)

					12 months, April to March		
Count or Number					1933-34	1934-35	1935-36
1	..	..	..	..	2,868,014	3,904,868	3,880,361
2	..	..	..	..	10,321,889	10,512,607	11,087,430
3	..	..	..	..	1,712,539	1,828,761	2,157,812
4	..	..	..	..	7,865,306	8,693,320	7,772,023
5	..	..	..	..	2,939,537	3,047,123	3,504,200
6	..	..	..	..	8,702,548	8,309,480	8,160,496
7	..	..	..	..	21,293,013	21,025,203	20,837,356
8	..	..	..	..	9,686,452	8,864,923	11,084,806
9	..	..	..	..	17,586,805	19,624,800	19,340,795
10	..	..	..	..	24,587,928	23,898,918	22,631,496
Total, Nos. 1 to 10 ..					107,564,031	109,710,003	110,456,775
11	..	..	..	..	41,118,036	37,364,214	41,039,811
12	..	..	..	..	29,292,071	31,102,301	32,688,584
13	..	..	..	..	25,374,511	24,341,203	31,640,633
14	..	..	..	..	34,993,635	36,347,718	44,240,376
15	..	..	..	..	24,475,032	25,487,188	25,366,764
16	..	..	..	..	33,090,042	36,520,005	38,775,574
17	..	..	..	..	18,080,623	16,858,605	20,952,411
18	..	..	..	..	36,652,359	38,610,054	38,399,823
19	..	..	..	..	16,513,544	17,512,098	16,207,589
20	..	..	..	..	180,276,493	199,316,861	194,304,580
Total, Nos. 11 to 20 ..					439,866,346	463,460,247	483,616,145
21	..	..	..	..	37,881,297	42,126,279	43,347,930
22	..	..	..	..	48,254,473	45,366,920	50,546,371
23	..	..	..	..	8,251,865	11,806,318	11,373,205
24	..	..	..	..	41,641,472	46,505,214	49,118,087
25	..	..	..	..	3,301,820	5,845,707	7,199,083
26	..	..	..	..	18,665,411	21,516,817	24,604,972
27	..	..	..	..	5,745,954	5,013,722	2,626,889
28	..	..	..	..	17,109,097	18,107,971	19,501,122
29	..	..	..	..	4,303,043	6,751,455	6,420,564
30	..	..	..	..	69,672,704	79,373,109	72,874,955
Total, Nos. 21 to 30 ..					254,827,136	282,413,512	287,613,178
31	..	..	..	..	1,350,537	1,066,631	2,089,837
32	..	..	..	..	17,939,084	20,041,710	24,299,863
33	..	..	..	..	925,816	591,484	751,747
34	..	..	..	..	2,623,154	4,332,700	5,687,253
35	..	..	..	..	1,651,643	1,808,645	3,290,583
36	..	..	..	..	2,527,137	4,509,067	4,975,999
37	..	..	..	..	458,066	683,459	1,221,970

INDIA—continued

					12 months, April to March		
Count or Number					1933-34	1934-35	1935-36
38	..	..	..	..	3,734,463	5,968,126	5,371,207
39	..	..	..	..	325,308	334,287	449,765
40	..	..	..	..	44,274,801	56,707,809	63,887,985
Total, Nos. 31 to 40 ..					75,810,009	96,043,918	112,026,209
Above 40					37,358,405	43,876,496	58,528,164
Wastes, etc.					5,634,696	5,915,641	6,056,430
GRAND TOTAL ..					921,060,623	1,001,419,817	1,058,296,901

DETAILED STATEMENT OF THE QUANTITY (IN POUNDS) AND THEIR EQUIVALENT (IN YARDS) AND DESCRIPTION OF WOVEN GOODS MANUFACTURED.

GRAND TOTAL, INDIA (BRITISH INDIA AND INDIAN STATES)

		12 months, April to March		
Description		1933-34	1934-35	1935-36
Grey and bleached piece-goods :				
Chadars	lbs.	21,086,637	23,196,349	23,685,246
	yds.	56,153,643	58,945,571	59,444,884
Dhooties	lbs.	188,119,039	215,145,151	234,173,502
	yds.	978,529,398	1,110,043,646	1,240,340,556
Drills and jeans ..	lbs.	26,504,561	29,525,475	32,136,569
	yds.	104,268,967	118,587,808	128,898,928
Cambrics and lawns ..	lbs.	10,429,043	16,216,822	16,191,679
	yds.	77,614,418	121,714,263	129,690,723
Printers	lbs.	3,444,468	3,956,941	2,944,017
	yds.	18,098,352	20,904,766	15,973,248
Shirtings and long-cloth ..	lbs.	162,016,989	187,482,809	182,161,819
	yds.	726,078,879	863,484,351	842,516,503
T-cloth, domestics, and sheetings ..	lbs.	36,683,596	41,322,034	38,836,445
	yds.	136,957,922	161,910,444	152,072,567
Tent-cloth	lbs.	2,189,310	2,504,053	3,046,110
	yds.	5,204,211	6,131,030	7,488,852
Khadi, Dungri or Khaddar	lbs.	30,673,107	35,840,623	37,751,012
	yds.	91,290,424	106,225,904	116,406,563
Other sorts	lbs.	14,048,044	15,531,943	16,860,329
	yds.	70,798,685	73,706,282	80,147,212
Total		lbs. 495,794,794	570,722,200	587,786,728
		yds. 2,264,994,899	2,641,654,065	2,772,980,036
Coloured piece-goods ..	lbs.	137,610,496	147,466,140	152,872,906
	yds.	680,056,828	755,801,981	797,878,975
Grey and coloured goods, other than piece-goods ..	lbs.	3,391,982	3,703,737	5,117,609
	doz.	841,761	930,523	1,291,025
Hosiery	lbs.	2,340,336	4,718,435	5,304,435
	doz.	745,391	1,481,708	1,648,066
Miscellaneous	lbs.	4,864,133	6,208,320	5,673,448
Cotton goods mixed with silk or wool	lbs.	1,859,114	3,830,265	4,676,151
GRAND TOTAL	lbs.	645,860,855	736,649,097	761,431,277
	yds.	2,945,051,727	3,397,456,046	3,570,859,011
	doz.	1,587,152	2,412,231	2,939,091

(Compiled in the Office of the Director-General of Commercial Intelligence and Statistics, India, Calcutta.)

COTTON TEXTILE IMPORTS INTO INDIA.

(From a report prepared by H.M. Senior Trade Commissioner in India.)

Imports of Cotton Yarns and Piece Goods into India during the half-year April 1 to September 30, 1936:—

Cotton Yarns.—The total imports fell from 10,976,380 lbs. (Rs.173 lakhs) to 16,344,833 lbs. (Rs.138 lakhs). The share of the United Kingdom dropped from 4,773,105 lbs. (Rs.48½ lakhs) to 4,114,327 lbs. (Rs.40½ lakhs). Arrivals from Japan also dropped from 9,314,571 lbs. (Rs.82½ lakhs) to 8,925,007 lbs. (Rs.72 lakhs). Imports from China fell from 5,855,187 lbs. (Rs.41½ lakhs) to 3,286,084 lbs. (Rs.25 lakhs).

Grey Piece Goods (plain grey).—The total imports fell slightly from 100,131,128 yards Rs.123 lakhs) to 96,509,270 yards (Rs.112 lakhs). The fall was mainly borne by the United Kingdom, the imports whence dropped from 11,860,610 yards (Rs. 15 lakhs) to 6,562,249 yards (Rs. 10 lakhs). On the other hand, imports from Japan rose slightly in quantity from 88,053,568 yards to 89,884,705 yards, but fell in value from Rs.107 lakhs to Rs.102 lakhs.

Grey Piece Goods (bordered greys).—The total value of imports fell from 58,513,826 yards (Rs.83 lakhs) to 53,819,593 yards Rs.75 lakhs). The United Kingdom share fell from 33,544,616 yards (Rs.55 lakhs) to 23,461,006 yards (Rs.40½ lakhs) while that of Japan advanced from 24,969,210 yards (Rs.28 lakhs) to 30,354,587 yards (Rs.35 lakhs).

White Piece Goods (bleached).—The aggregate imports again receded from 137,800,955 yards (Rs.257 lakhs) to 108,722,851 yards (Rs.215 lakhs). Imports from Lancashire again fell from 106,886,093 yards (Rs.207 lakhs) to 78,817,249 yards (Rs.162 lakhs). Arrivals from Japan were slightly reduced from 28,467,441 yards (Rs.40 lakhs) to 26,412,049 yards (Rs.39 lakhs). Imports from Switzerland expanded considerably from 1,175,993 yards (Rs.5½ lakhs) to 2,337,390 yards (Rs.9½ lakhs). Arrivals from Holland also rose from 745,638 yards (Rs.2 lakhs) to 841,852 yards (Rs.2.3 lakhs).

Printed Piece Goods.—The total imports fell from 111,287,601 yards (Rs.168 lakhs) to 99,749,008 yards (Rs.153 lakhs). Here again, almost the entire loss was borne by the United Kingdom, whose imports fell from 36,852,748 yards (Rs.81 lakhs) to 25,165,301 yards (Rs.55½ lakhs). On the other hand, arrivals from Japan rose from 74,358,184 yards (Rs.87 lakhs) to 74,558,420 yards (Rs.98 lakhs).

Dyed Piece Goods.—The aggregate trade declined from 54,003,287 yards (Rs.125 lakhs) to 42,735,481 yards (Rs.157 lakhs). Imports from the United Kingdom dropped from 41,765,847 yards (Rs.105 lakhs) to 33,510,062 yards (Rs.89½ lakhs). Arrivals from Japan were also reduced from 10,596,716

yards (Rs. 14½ lakhs) to 7,123,378 yards (Rs. 11½ lakhs). On the other hand, imports from Switzerland rose from 926,314 yards (Rs. 3 lakhs) to 1,497,384 yards (Rs. 4½ lakhs).

Woven Coloured Piece Goods.—Here again, there has been a shrinkage of the total trade from 16,063,935 yards (Rs. 37 lakhs) to 7,150,098 yards (Rs. 18½ lakhs). The United Kingdom share fell from 4,655,706 yards (Rs. 13½ lakhs) to 1,830,575 yards (Rs. 7 lakhs). Imports from Japan dropped from 11,113,338 yards (Rs. 22 lakhs) to 5,124,921 yards (Rs. 11 lakhs).

Fents.—The total trade rose from Rs. 36 lakhs to Rs. 46 lakhs, mainly due to an expansion of Japanese shipments of fents of all kinds, from Rs. 29½ lakhs to Rs. 39½ lakhs. Imports from the United Kingdom rose from Rs. 3½ lakhs to Rs. 5 lakhs, while arrivals from the U.S.A. fell from Rs. 3 lakhs to Rs. 1½ lakhs.

Cotton Sewing Thread.—The total imports advanced from 934,631 lbs. valued at Rs. 24 lakhs to 1,232,646 lbs. valued at Rs. 27 lakhs. Imports from the United Kingdom rose from 744,116 lbs. (Rs. 20 lakhs) to 876,283 lbs. (Rs. 22 lakhs). Imports from "other countries" also advanced from 190,515 lbs. (Rs. 4½ lakhs) to 366,363 lbs. (Rs. 5½ lakhs).

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AMERICAN COTTON CONSUMPTION, OCTOBER 31, 1936,
WITH COMPARISONS

(Exclusive of linters)

Month	1913-14 Bales	1932-33 Bales	1933-34 Bales	1934-35 Bales	1935-36* Bales	1936-37 Bales	5-year average, 1931-32 to 1935-36 Bales	Per cent. this year is of 5-year average Per cent.
August	432,350	404,497	588,902	418,941	408,325	574,289	449,139	127.9
September ..	442,435	492,742	499,482	294,696	450,647	629,727	440,380	143.0
October	511,923	501,893	504,055	523,082	552,840	646,499	508,569	127.1
Total, 3 months	1,386,708	1,399,132	1,592,439	1,236,669	1,411,812	1,850,515	1,398,088	132.4
November ..	456,356	502,434	475,247	480,081	512,312	—	479,060	—
December ..	456,262	440,439	347,524	417,344	499,773	—	424,096	—
January	517,299	470,182	508,021	550,558	590,484	—	510,793	—
February ..	455,231	441,203	477,046	480,339	515,977	—	473,161	—
March	493,354	495,183	544,870	482,373	550,841	—	512,395	—
April	499,646	470,359	512,594	468,402	576,762	—	478,920	—
May	466,744	620,561	510,299	470,412	530,894	—	494,708	—
June	446,145	697,261	363,262	383,989	555,449	—	464,532	—
July	448,338	600,641	359,951	390,712	607,056	—	447,385	—

Total, 12 months 5,626,078 6,137,395 5,700,253 5,360,867 6,351,160 — 5,683,138 —

* Subject to slight revisions.

EXPORTS OF AMERICAN COTTON, AUGUST 1 TO NOVEMBER 6, 1936,
WITH COMPARISONS

(Compiled from Government and commercial reports)

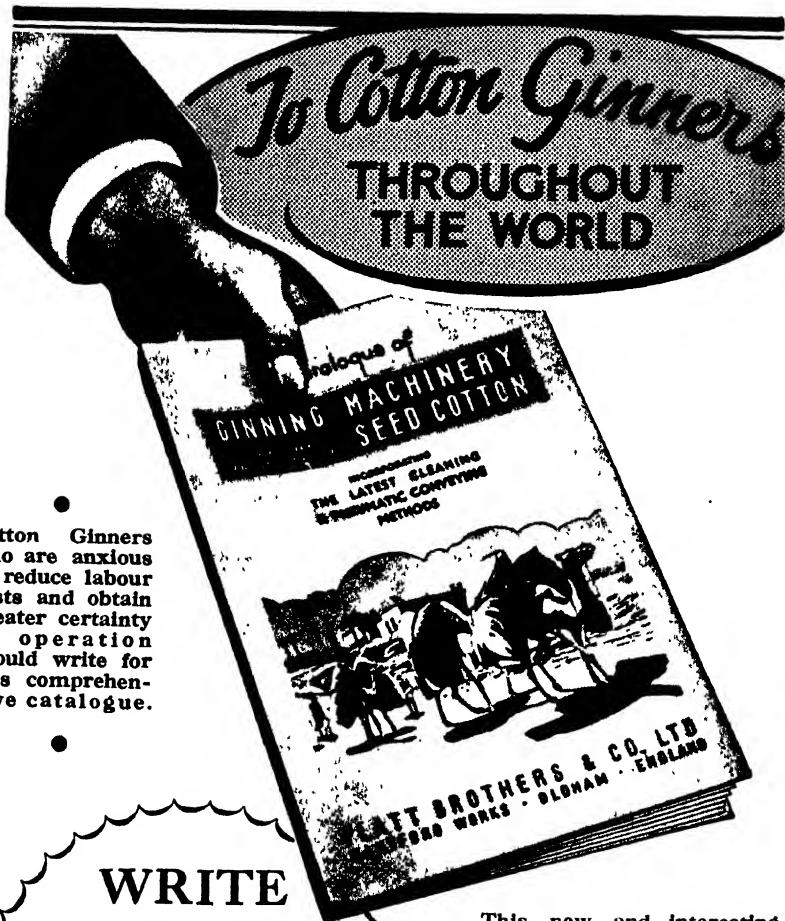
To—	Aug. 1 to Nov. 7, 1913 Bales	Aug. 1 to Nov. 10, 1933 Bales	Aug. 1 to Nov. 9, 1934 Bales	Aug. 1 to Nov. 8, 1935 Bales	Aug. 1 to Nov. 6, 1936 Bales	4-year average 1932-35 Bales	Per cent. this year is of 4-year average Per cent.
Great Britain ..	1,091,064	473,031	205,201	429,311	364,985	381,049	95.8
France	510,633	366,358	146,868	184,021	318,793	261,084	122.1
Germany	920,746	553,549	176,927	213,271	273,192	406,360	67.2
Italy	124,487	263,981	130,294	125,053	84,074	187,536	44.8
Japan	79,316	646,852	560,081	417,080	477,045	510,199	93.5
Spain	89,756	90,653	79,557	60,453	—	83,471	—
Belgium	69,044	48,899	23,143	43,044	46,466	44,242	105.0
Canada	8,304*	56,039	62,000	46,454	62,006	52,151	118.0
Other countries ..	104,522	277,984	183,433	167,419	171,669	210,864	81.4
Total	2,997,874	2,777,351	1,567,504	1,686,106	1,798,230	2,136,946	84.1

* August 1 to September 30.

EGYPTIAN COTTON CONSUMED IN THE UNITED STATES

(Equivalent 500 lb. bales)

Month	1928-29	1929-30	1930-31	1931-32	1932-33	1933-34	1934-35	1935-36	1936-37
August	18,759	20,285	7,673	5,667	6,398	11,387	7,871	4,700	5,557
September ..	16,297	17,484	7,915	7,096	6,323	8,967	4,512	5,559	5,910
October	20,057	20,107	9,429	6,598	7,858	9,525	10,332	6,420	5,977
November ..	17,858	18,263	8,980	6,609	7,908	8,990	8,477	5,222	—
December ..	18,003	17,976	10,134	6,509	6,645	6,150	6,801	5,522	—
January	22,325	19,646	7,782	6,811	5,998	10,227	8,745	6,578	—
February ..	19,546	17,036	8,377	6,555	6,253	9,281	7,004	5,566	—
March	20,615	15,826	8,774	8,263	7,212	10,706	6,904	4,989	—
April	20,159	18,156	9,763	6,427	6,217	8,552	6,794	5,798	—
May	20,484	15,947	8,630	6,908	9,319	7,380	5,825	5,182	—
June	18,046	13,278	8,898	6,026	9,040	6,284	4,519	5,297	—
July	20,343	11,761	7,740	6,085	9,634	6,006	4,665	6,149	—
Total	232,392	205,765	104,095	79,464	88,805	103,455	82,249	66,982	—



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English Spindles Board Census

The results of the first inquiry by the Spindles Board under the Cotton Spinning Industry Act of last year are summarized in a statement issued by Mr. F. S. Towle, manager and secretary of the Board.

The total number of cotton-spinning spindles in Great Britain on September 14, 1936, was 40,501,414, of which 29,459,379 were mule spindles and 11,042,035 ring spindles. Taking two ring spindles as the equivalent of three mule spindles, the productive capacity of the cotton-spinning industry in Great Britain was, therefore, 46,022,431 mule equivalent spindles.

Yarns spun from American-type cotton represented about 75 per cent. of the total output of cotton yarn, and yarns spun from Egyptian-type cotton represented about 25 per cent.

The spinning industry as a whole was operating during the six months ending September 14, 1936, at about 77 per cent. of full time. It is estimated that the industry contained nearly 10,500,000 mule equivalent spindles more than were required for the production, with full-time operation, of the yarn actually spun. Four million more equivalent spindles were in mills that had been stopped during the whole of the six months.

SPINDLE CAPACITY AND ACTIVITY.

The mule equivalent spindles in place on September 14, were contained in 581 separate mills. The five principal spinning districts—Bolton, Oldham, Royton, Rochdale, and Ashton-under-Lyne—each containing more than 3,500,000 mule equivalent spindles, together accounted for 61.6 per cent. of the total. Mills outside Lancashire (including Stockport, Glossop, Yorkshire, and Scotland) accounted for 3,878,400 mule equivalent spindles, or 8.4 per cent. of the total. There were, throughout the industry, 2.7 mule spindles to every ring spindle.

The average number of spindle-hours worked per spindle in place was 883—865 on mule spindles and 932 on ring spindles. A mill working full time during the six months would have run approximately 1,152 hours, after allowing for holidays. Thus, the average number of hours worked per spindle represents about 77 per cent. of full-time operation.

Mills to the number of 240, containing 21,500,000 mule equivalent spindles, or 47 per cent. of the total number of spindles in the industry, were running at more than 90 per cent. of full time;

160 mills, with 13,200,000 mule equivalent spindles, or nearly 29 per cent. of the total, were running between 70 per cent. and 90 per cent. of capacity; 51 mills, with 4,500,000 mule equivalent spindles, were running between 50 per cent. and 70 per cent. of capacity; and 43 mills, with 2,400,000 mule equivalent spindles, were running at less than 50 per cent. of capacity. These figures do not include completely stopped mills or mills which made incomplete returns.

UNUSED CAPACITY.

During the six months ended September 14, 6,200,000 mule equivalent spindles were completely idle. Of these 4,000,000 were in 76 mills which did not run at all during the half-year; in other words, 8.6 per cent. of the total number of spindles were in closed mills.

The proportion of spindles in closed mills was especially large in Oldham, where there were 12 closed mills out of 92 in the district, and in Rochdale, where 12 mills out of 54 were closed. In Stockport and in Scotland there were no closed mills; Leigh, Hollinwood and Wigan each had only one closed mill.

In order to find out how far the total number of spindles in the industry exceeds the number required, on a full-time basis, to spin the yarn actually produced, account must be taken not only of stopped spindles but also of spindles running short time. The total number of hours not worked, in mills running short time during the six months covered by the inquiry, was equivalent to the complete stoppage for six months of rather more than 6,400,000 mule equivalent spindles. This unused capacity represented 14.1 per cent. of the total mule equivalent spindles in place.

The total unused capacity of the industry during the six months was, therefore, as follows:—

	Million mule equivalent spindles
Completely closed mills	4.0
Completely stopped spindles in running mills	2.2
Spindle hours unused on running spindles	4.2

Altogether the unused capacity of the industry amounted to 10,400,000 mule equivalent spindles, or 23 per cent. of the total spindles in place.

In the American section and in the coarse class a greater proportion of the unused capacity in running mills consisted of completely stopped spindles than in the Egyptian section or in the medium and fine classes.

In 1934 the Colwyn Committee report estimated that early in that year the industry contained 13,500,000 mule equivalent spindles more than were needed for full-time working. Thus during the last two and a half years the unused capacity of the industry appears to have been reduced by about 3,000,000 mule equivalent spindles. In the same period the number of spindles in place has fallen by about 6,000,000. The difference between this figure and the decline in unused capacity may be largely accounted for by the trend towards the production of coarser counts, which has increased the average weight produced per spindle

In the last two and a half years the character of the unused capacity has changed; the reduction of unused capacity is partly attributable to the reduction in the number of closed mills, while the unused capacity in running mills has slightly increased.

BRITISH YARN PRICE SCHEME FOR DOUBLED YARNS

A price-maintenance scheme for doubled yarns was unanimously adopted at a meeting recently held in Manchester under the chairmanship of Mr. W. M. Wiggins, President of the Federation of Master Cotton Spinners' Associations. Represented at the meeting were firms in all parts of the British Isles. The scheme itself is similar to the one prepared for the fine spinners (now awaiting a sufficient majority to become legal), and covers the plain doubling section of the trade, including counts up to 50's in twofold and threefold yarns.

The scheme requires a 90 per cent. majority of the spindleage before it can come into force. Sub-committees are to set to work preparing schemes for other types of doubled yarns which will eventually be put before the trade.

MEDIUM COUNTS COTTON YARN AGREEMENT IN LANCASHIRE.

A legally binding price agreement for the medium American mule spinning section of the Lancashire cotton industry, covering 50 mills, has now been signed. At a meeting in Manchester on December 22, presided over by Mr. Frank Platt, of the Lancashire Cotton Corporation, the necessary resolutions were adopted. The agreement came into effect on December 23 and will continue for two years. Under it prices will be advanced by a sum of between $\frac{1}{4}$ d. to $\frac{1}{2}$ d. a pound, according to counts. The position now is that 12,500,000 spindles in the American mule spinning section, covering two types of production, come within the scope of the new agreement and the coarse counts agreement, in both of which there are reciprocal clauses.

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Lancashire and the Indian Trade.

The following is extracted from the recently published Report on Economic and Commercial Conditions in India, by Sir Thomas M. Ainscough, C.B.E., H.M. Senior Trade Commissioner in India and Ceylon. The full report, price 3s. 6d., has been published by the Department of Overseas Trade, and may be obtained from H.M. Stationery Office. The remarks quoted are in the nature of a general forecast of the trend of affairs in India.

GENERAL FORECAST (JUNE, 1936).

The issue of the Government of India notification reducing, with effect from June 25, the duties on all United Kingdom cotton piece goods (with the exception of printed fabrics) from 25 to 20 per cent. in accordance with the recommendations of the Special Tariff Board brings belated relief to a situation which, owing to uncertainty, was rapidly deteriorating. The total imports of Lancashire goods had fallen in 1935-36 to 440 million yards. Owing to the uncertainty with regard to the future fiscal position, buyers have for months been holding back with the result that the imports during April and May declined by a further Rs.64 lakhs even compared with the corresponding period of last year. The reduction of duties will now remove this hesitation and, fortunately, the announcement has been made before the main buying season of the year for December-January-February shipment opens.

The first effect of the new duties will be to encourage the numerous importers and dealers, who have for years steadily sustained losses in the Lancashire trade and who were on the point of abandoning it altogether, to restock their established qualities and endeavour to recoup some of their losses. This should give a stimulus to the trade during the next twelve months, although it is likely that the major portion of the 5 per cent. concession will be retained by the dealer in order to improve his margin of profit and will not be passed on to the consumer. In the second place, the fiscal reduction will increase the differential margin *vis-à-vis* Japanese goods to 30 per cent., and should divert a certain amount of trade from Japan to Lancashire. This advantage will, of course, entirely depend on the outcome of the negotiations, which opened in July, for a revision of the Indo-Japanese Protocol of 1934. If the existing quota and category arrangements are continued and made more effective and if to the quota are added Japanese fents, artificial silk goods and made-up goods, then the additional advantage may be a very real one.

These two factors may involve an addition to the United Kingdom trade of 80 to 100 million yards within the next year. After this first expansion, however, it is doubtful whether imports can be maintained at more than, say, 450 to 500 million yards per annum unless there is a very material increase in the prosperity and resulting purchasing power of the Indian consumer. In view of the rapid increase in volume and improvement in quality and range of Indian mill production, competent observers in India hold the view that the reduction to 20 per cent. is quite inadequate to stimulate any appreciable permanent increase in India's con-

sumption of Lancashire piece goods. The view, however, is widely held that a reduction to 15 per cent. would give a definite fillip to such styles as fine bleached goods, prints and dyed and woven coloured goods which are, so far, not produced in considerable quantities in India and which have been either partially or wholly excluded by the high tariff of 25 per cent.

Lancashire imports are being driven from the Indian market by substitution of Indian and Japanese goods, owing to the fact that their landed price is above the purchasing power of the Indian consumer. Any relief can, therefore, only be obtained either from a reduction in their cost (by reason either of a revolution in Lancashire methods of production or a reduction of the import duty to 15 per cent.) or from a very pronounced increase in the income of the consumer as a result of a return of agricultural prosperity.

THE BRITISH COTTON INDUSTRY AND STATUTORY CONTROL SCHEMES.

A fully representative meeting of the Joint Committee of Cotton Trade Organizations, held recently in Manchester, unanimously decided that proposals for statutory authority to be given to schemes approved by an adequate majority in each section of the cotton industry should be prepared by the Joint Committee of Cotton Trade Organizations.

The discussion showed that opinion in all sections of the industry is turning strongly towards some form of internal control based on legislation.

Several speakers emphasized the contrast between the condition of the cotton industry and other British industries which are gradually returning to prosperity as a result of Government intervention. It was pointed out that although the cotton industry of Great Britain still employs more than 400,000 people and provides the country's largest export trade it has not benefited so much as other industries from the trade negotiations which the Government has conducted during the last few years. On the contrary, countries which were formerly large customers for Lancashire goods are now establishing their own textile industries owing to the restriction of their market in the United Kingdom.

It was suggested that there was no reason why the cotton industry should not obtain a return for its products which would provide fair remuneration for labour and capital and offer more attractive prospects than now exist for those entering the industry.

Emphasis was laid on the necessity of retaining, and wherever possible expanding, overseas markets, but it was agreed that before this could be done stability within the industry was essential.

After hearing the views of spokesmen from each section of the industry the meeting instructed the Joint Committee Executive to consult the various sectional organizations with a view to preparing proposals which should be submitted to the Government on behalf of the industry as a whole.

WAGES AND HOURS AGREEMENTS IN THE BELGIAN TEXTILE INDUSTRY.

According to the November, 1936, issue of the *Ministry of Labour Gazette*, it has been agreed that, in the East and West Flanders and the Verviers areas of Belgium the minimum daily wage of adult male textile workers should be 30 francs for eight hours' work. Increases were granted, in East and West Flanders, of 15 per cent. to lower-paid time workers and 6 per cent. to all other workers, and, in the Verviers area, of 9 per cent. to all workers. Decision on the question of the shorter working week was deferred pending the introduction of legislation.

The Forty-hour Week in France.

FIVE further Decrees in application of the Forty-hour Week Act were issued in France on November 17, 1936. The new measures concern the building industry, public works, and the manufacture of building materials; the textile trade; underground work in iron mines; surface work in iron mines; and bakeries in the Department of Seine-et-Marne. The substance of the Decree relating to the Textile Industries is given below:—

TEXTILE INDUSTRIES.

The second Decree applies to the whole of the textile industry and covers all undertakings or parts of undertakings in which the following industries are carried out: spinning of flax, hemp, jute and rope work; weaving of cloth; cotton trades, woollen trades, silk industry; bleaching, conditioning, dyeing and printing of yarns and tissues; hosiery factories, factories manufacturing lace, gimp, embroidery, light tissues, etc.; manufacture of trimmings, ribbons, etc.; ill-defined textile industries. The provisions of the Decree also apply to workshops attached to the above-mentioned establishments.

Limitation of hours. The undertakings or parts of undertakings to which the provisions of the Decree apply may choose between the following methods of limiting hours: (1) limitation of actual time worked to eight hours in the day for five days in the week, with no work on either Saturday or Sunday; (2) limitation of actual time worked to six hours forty minutes on each week-day; (3) unequal distribution of the forty hours over the different days of the week with a view to establishing a Saturday half-holiday, provided not more than eight hours are worked on any one day.

When work is organized in successive shifts, the work of each shift will be continuous, except in so far as it is interrupted by breaks for rest. Nevertheless, in the net, gimp, and lace industries permission to organize shifts working discontinuously may be

granted by the factory inspector when the employers' and workers' organizations agree to apply for such exemptions.

In case of work which must by reason of its nature continue day and night during the whole week without interruption, weekly hours may average forty-two, the period of calculation being twelve weeks, provided that not more than eight hours are worked on any one day, and that each worker receives a weekly rest period of at least twenty-four consecutive hours.

For the staff of departments in which work, although not necessarily continuous, depends technically on services where work is necessarily continuous, the actual time worked may be limited to eight hours for five days a week, with no work on one day during the week.

Recovery of time lost. The Decree permits the making up of time lost as follows:—

(a) In case of collective stoppage due to accidental causes of *force majeure* (accidents to plant, failure of driving power, bad weather, general shortage of materials or means of transport, catastrophes; the working of longer hours to make up time lost may not lead to an increase of more than one hour a day, except where special permission is granted by the factory inspector for a maximum prolongation of two hours:

(b) Industries which can show that they have slack periods of work at certain times of the year as a result of the special conditions in which they work may be authorized to make up for time thus lost up to a maximum of 100 hours a year and one hour a day, by Ministerial Order issued after consultation with the workers' and employers' organizations concerned, including the national occupational organizations concerned; in case of exceptional prolonged unemployment in an occupational group, the factory inspector may suspend the right to make up time lost for this group:

(c) In undertakings where the usual working time-table includes, in addition to the weekly rest day, a day or half-day of rest, the workers may be employed on this day or half-day in compensation for time lost by reason of a public holiday, provided that this does not increase the hours worked to over 40 in the week.

Permanent exemptions. Permanent exemptions permitting the daily hours of the whole undertaking to exceed the general limits defined above are also provided. These apply to the following types of work: (1) work of persons specially employed in connection with ovens, stoves, drying rooms, or boilers other than those used for generating power and in the heating of tubs and vats, provided that this work is really preparatory or accessory, and does not constitute the main work of the undertaking; work of mechanics, electricians and stokers employed in connection with the power supply, lighting and heating, the maintenance of lifting apparatus and the water supply and internal railways (maximum, $1\frac{1}{2}$ hours, or 2 hours in case of firemen or steam machinery); (2) oiling the main shafting (maximum, 2 hours); (3) cleaning machinery, frames and other production plant (maximum, 1 hour or $1\frac{1}{2}$ hours for machinery and frames specified by a Ministerial Order issued after consultation with the employers' and workers' organizations concerned; (4) cleaning frames in connection with the

spinning of flax, hemp, jute, ramie, and substitutes for these; cleaning of self-acting mules in cotton spinning (maximum, $1\frac{1}{2}$ hours); (5) oiling of self-acting mules in wool spinning (maximum, 15 minutes);

(6) Work of foremen, charge hands, and workers employed specially in the repairing or regulation of frames, in order to complete the repair or regulation of a frame, provided that such work can be carried out during the duration of the exemption (maximum, $\frac{1}{2}$ hour); (7) oiling of automatic spinning frames in the spinning of jute (maximum, 2 hours, subject to compensatory rest); (8) work of persons engaged in operations dependent upon technical reactions which cannot be stopped at will, when it has not been possible to complete them within the period fixed by regulation on account of exceptional circumstances (maximum, 2 hours); (9) work done to load or unload cars, ships, aeroplanes or lorries within the stipulated period, in cases where such exemption is necessary and sufficient to permit work to be finished within the period (maximum, 2 hours, subject to compensatory rest); (10) work of staff engaged in watch-keeping and supervision and of fire alarm services (maximum, 4 hours, provided the total week worked does not exceed 56 hours);

(11) Work of staff engaged on permanent ways connecting the undertaking with the main or local railway system (maximum, 2 hours); (12) work of persons employed in packing and dispatching goods (maximum, 1 hour, subject to compensatory rest); (13) work of drivers of motor or horse vehicles, delivery men, storekeepers (maximum, 1 hour, or $1\frac{1}{2}$ hours for drivers of horse vehicles; this maximum may be increased by $1\frac{1}{2}$ hours if the dinner period is counted as working time); (14) work of persons engaged in medical services or in charge of mothers' nursing rooms and other institutions established for the staffs of undertakings and their families (maximum, 1 hour); (15) timekeepers, office boys and similar employees, cleaners or premises (maximum, 1 hour).

These exemptions apply only to adult men, except those given under (3), (4), (5), (14) and (15), which may also apply to adult women.

Temporary exemptions. The Decree provides also for temporary exemptions, as follows: (a) urgent work, the immediate execution of which is necessary to prevent imminent accidents, to organize safety measures or to make good accidents to the material, plant or building of the undertaking (no limit for one day, which may be chosen by the head of the undertaking, 2 hours on subsequent days); (b) work done in the interests of national safety or defence, or of a public service, on receipt of a Government Order recognizing the necessity of such work (maximum to be fixed in each case); (c) urgent work in the event of extraordinary pressure of business (maximum, 75 hours a year provided not more than one extra hour is worked on any one day). In case of exceptional prolonged employment in an occupational group, the Minister of Labour may suspend, in whole or in part, the right to make up time lost under (c).

The extra hours worked under exemptions (b) and (c) above are to be considered overtime and paid at increased rates; the rate of overtime under (b) will be established by agreement between the

Minister of Labour and the Minister requiring the work to be done, account being taken of collective agreements and customary practice. The rate of overtime under (c) may not be less than time and quarter.

The provisions of this Decree come into force on January 1, 1937.

Extension of present regulations. The present regulations may be extended in respect of industries which show that they cannot apply one or several provisions of the Decree within the period prescribed. Such prolongation may be granted by order of the Minister of Labour and supplementary and different periods of extension may be arranged to cover the various branches included in an application for an extension. The duration of the first exemption may not exceed three months but it may be extended up to a maximum of six months; in no case, however, may successive periods of exemption exceed two years in all.

The German Four Year Plan for the Textile Industry.

THE following article, which throws light upon Germany's imports of textile raw materials, is reprinted from *Hamburgisches Welt-Wirtschafts - Archiv*:—

Two years have now elapsed since the announcement of the New Plan. During that time Germany has found it necessary to purchase her raw materials for the most part from those countries that were prepared to take German products in exchange. This necessity has given rise to changes in her buying markets, sometimes even on an unusually large scale. The replacing of her North American cotton suppliers by Brazil, Argentina and Turkey, the shifting of her wool purchases from Australia and New Zealand to Argentina and South Africa are but examples of this. Trade relations, once broken off, are not easy to resume, because of the adaptability of the new provider countries to their newly acquired markets. Thus, for instance, Turkey's cotton cultivation is about to be thoroughly reorganized, cotton being an important compensation article in her trade with Germany—and it is an interesting fact that a group of German experts have taken up the growing of cotton in South Anatolia. Such a change in the direction of commercial traffic followed by such an exploitation of production, which at the same time means increased market capacity, can no longer be rescinded, even if the cotton-producing countries undertake a complete revision of their previous policy.

Then again, the problem of raw material supply is the central problem of Germany's general economic planning. The improvement in German industry that resulted in a reduction of unemployment to the tune of five millions, has caused an extraordinary strain on her stock of foreign exchange and her foreign exchange revenues owing to the necessary extra purchases of foreign raw materials.

" It is therefore the duty of the National-Socialist leaders of the State and industry to subject to a thorough investigation what raw materials, fuels, etc., can be produced in Germany. The foreign exchange that can then be saved by that means shall in future serve as an extra security for the nourishment of the people and the purchase of those materials which can under no circumstances be produced in the country itself.

In four years from now Germany must be entirely independent of foreign countries for all those materials which she herself can in any way produce, by German capability, by chemistry, machine industry and mining."

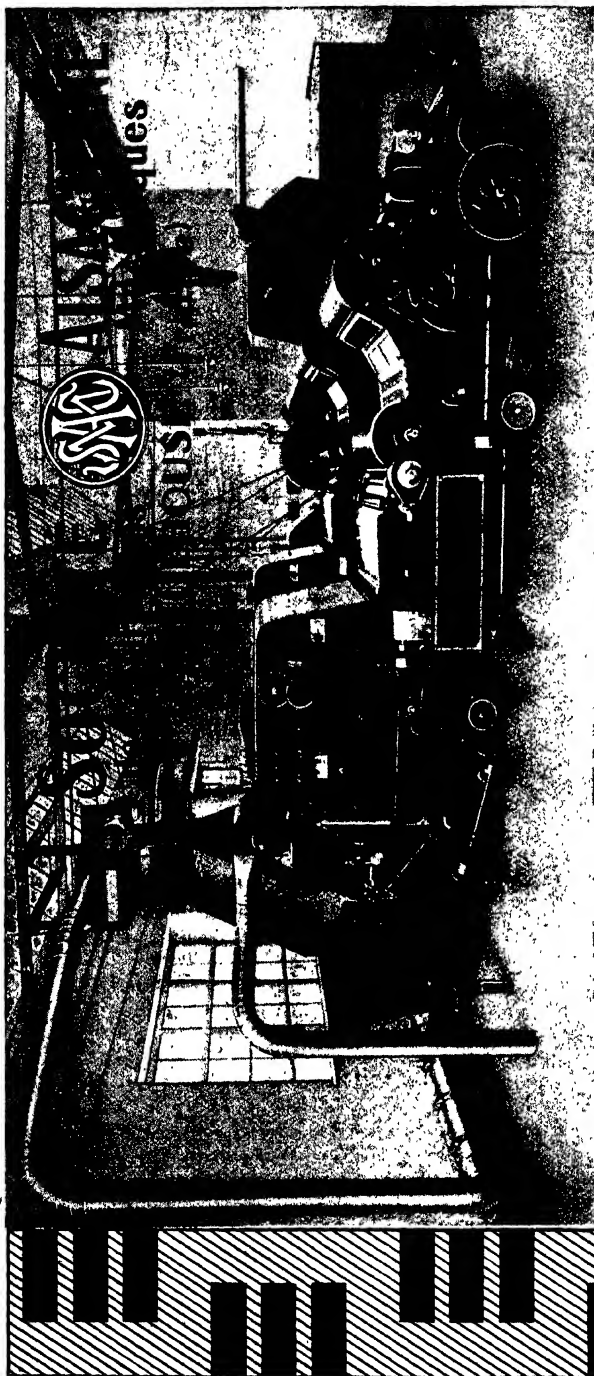
That is the directive principle of the Führer in his proclamation at the Party Congress at Nuremberg.

The new Four Year Plan thus announced faces Germany's textile industry with particularly difficult tasks. For nearly 90 per cent. of her raw material requirements in this branch she is dependent on foreign countries, and this raw material import constitutes in Germany's total imports one of the chief passive items of the foreign trade balance sheet. Of Germany's total imports in 1935 textile raw materials alone were 24 per cent. *ad valorem*, and 45.5 per cent. *ad valorem* of the total raw materials imported. But during the last few years, in spite of these figures, there has been a considerable easing off, as is proved by the following table:—

Year	Import surplus of important raw materials		of which were spinning materials		Percentage of spinning materials
1931	972	millions of RM.	504	millions of RM.	45.5%
1933	1,043	" "	566	" "	42.5%
1934	1,425	" "	606	" "	54.3%
1935	1,418	" "	645	" "	63.6%

The decline in the share taken by spinning materials in the total import surplus of raw materials may be attributed mainly to increased textile raw material production in Germany. Valuable as this fact is in itself, adequate self-sufficiency in raw materials will never be attained by extension of Germany's natural raw material basis—say by increased flax-growing or the keeping of more sheep. As regards the textile trade the main importance in the fulfilment of the Four Year Plan will have to be attached to the production of artificial raw materials, whereby the chief aim must be to produce no "substitute" raw materials, but "new" raw materials at least as good as the old one. The experience gained in the manufacture of rayon will be of great assistance to the German textile trade in this respect. As long as rayon had to be regarded as a substitute for pure natural silk it could only be looked upon as a stop-gap; only after gradual improvement to the present degree of perfection could it be regarded as an independent product of equal value, capable of competing successfully in the world's markets along with wool and cotton. To-day Germany again ranks fourth among the nations of the world as a producer of artificial fibre, after having dropped from first to fifth place between 1913 and 1933. The following figures show the present

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state of her own production of spinning material, both natural and artificial :—

	1933	1934	1935	1936
		(In 1,000 tons)		(estimated)
Wool production	14	15	16.5	—
Flax production	3.1	5.4	15.0	40.0
Hemp production	0.2	0.4	2.6	7.0
Artificial silk production	34.0	42.9	46	—
Staple fibre production	—	7.2	15.6	—

We see that in Germany there is a considerable increase in the production of natural spinning materials, but it is limited by the available exploitation areas. The increase in flax and hemp growing and in the number of sheep has, however, had a beneficial effect on the import side of our trade balance. On the other hand, the production of artificial fibre is not so narrowly restricted.

The following table shows how greatly Germany's foreign trade is affected by her own production of spinning materials :—

IMPORTS BY GERMANY ON TEXTILE RAW MATERIALS

Spinning material	1933	1934	1935	Jan.-June, 1936
		(In 1,000 tons)		
Cotton (total)	434.35	322.68	310.08	134.41
Egypt	40.61	44.9	39.27	16.04
Belgian Congo	3.00	4.6	5.22	2.02
British India	37.16	35.2	27.89	16.00
China	3.25	0.5	3.79	2.41
Persia	1.97	6.31	5.19	1.57
Turkey	0.63	5.80	15.23	11.75
Argentina	5.50	5.82	14.40	3.92
Brazil	—	8.41	82.37	12.58
Peru	10.10	11.42	25.15	5.52
U.S.A.	326.25	193.50	74.96	52.27
Sheep's wool (total)	158.86	145.68	123.96	67.46
British South Africa	25.23	20.56	33.49	17.73
Argentina	19.73	20.57	26.85	14.05
Uruguay	11.67	10.32	7.90	3.23
Australia	63.00	44.89	16.58	7.83
New Zealand	21.29	19.89	2.46	1.81
Cotton waste (total)	57.76	82.89	67.68	45.20
British South Africa	2.54	7.05	16.16	5.03
Russia	3.52	2.16	2.48	0.43
British India	2.77	2.86	4.47	4.24
China	4.22	3.56	7.08	3.13
Japan	3.70	3.74	5.78	2.83
U.S.A.	28.40	29.90	32.45	24.88
Flax (total)	10.50	17.02	13.48	3.49
Russia	5.12	10.62	7.94	0.01
Hemp (total)	13.57	15.40	22.22	6.96
Italy	11.46	11.47	16.20	5.07
Turkey	0.05	0.29	0.74	0.55
Jute, jute tow (total)	125.40	116.19	127.58	56.73
British India	124.00	112.05	124.02	55.44
Manila, hemp, tow (total)	2.97	3.67	4.78	2.32
Philippine Islands	2.64	3.60	4.65	2.32
Cocoanut fibre (coir) (total)	0.64	0.87	0.61	0.50
Ceylon	0.31	0.42	0.36	0.26
Agave fibre (total)	46.96	40.94	55.22	13.19
British East Africa	8.16	4.17	4.30	0.60
German East Africa	13.98	13.26	14.50	4.91
Portuguese East Africa	3.96	2.87	4.81	2.08
Dutch Indies	14.40	13.28	22.09	2.98
Mexico	3.86	4.17	7.92	0.36

The most striking feature is the increase in imports from Turkey, already referred to above, and from Brazil, Argentina and Peru. In 1935 Brazil became Germany's chief supplier of cotton, and in fact the young cotton-growing countries have come forward with a rush. Thus in 1935 the three South American states already delivered 40 per cent. of Germany's total cotton requirements. Their deliveries rose to fifteen times what they had been in 1933. True, the first half-year of 1936 shows a retrograde tendency, mainly due to Brazil's ban on deliveries through clearing, also for the future.

Australia and New Zealand now play but a modest part in the supplying of wool to Germany. In these countries the urge is increasing for an agreement with Germany on the lines of the German-South African agreement, which has borne good fruit. Such an agreement could be concluded the more easily as both countries are mainly of an agricultural character and therefore unusually capable of absorbing German industrial products, besides which the newly established Australian industry takes a great interest in the importation of German production articles, as was plainly expressed in the recent reduction of the duty on such goods.

Concerning importation of cotton waste it must be said that during the past three years the quantities have remained fairly constant, though for these goods, too, there has been a change in the buying countries. - The chief provider continues to be the United States.

Imports of Russian flax, which in 1933 were 50 per cent. of the total imports, were in 1935 but very slight, and have dropped out altogether in 1936.

Germany's purchases of hemp, jute and coir have remained fairly constant during the last few years; nor has there been any material change in the supplier countries.

Considering the important rôle played by the importation of spinning materials in German foreign trade, it will call for an enormous achievement to make Germany independent of foreign countries for her textile trade—as far as can be justified.

It will be the task of the German spinning material trade, in collaboration with science and technology, to do its utmost to extend the national raw material basis to the limit of possibility during the four years at its disposal.

QUOTA CARTEL FORMED IN CZECHO-SLOVAKIA.

A quota cartel of all cotton-spinning mills (with the exception of the Egyptian section) was formed on December 11, 1936, in Czecho-Slovakia. The present cartel is not a price cartel, but only a quota cartel. Subject to the quota are both sales and deliveries. Excepting two smaller firms, all working cotton mills are members of this cartel, which is a voluntary one. Foundation of the cartel had been preceded by a voluntary sale restriction in form of a "gentlemen's agreement." This voluntary restriction of sales was observed by all cotton mills, including the Egyptian section.

Spinners of the Egyptian section are for the time being working according to this scheme, although their cartel has not been as yet established.

Labour Regulations in Norway.

The following is extracted from the December, 1936, issue of the *Ministry of Labour Gazette*:—

HOURS OF WORK.

The new provisions do not differ markedly from those hitherto in force, and retain 48 as the maximum weekly number of hours which may normally be worked. As regards daily working time, however, the Act reduces the maximum from $8\frac{1}{2}$ to 8 hours, but provides that, where it is the rule to work less than 8 hours on certain days of the week, working time on the other days may be correspondingly extended, the extension being limited to one hour a day. In undertakings with continuous processes, and in other specified cases, modifications of the normal working time must, over stated periods of varying length, be equivalent to an average of 48 hours a week. Workers whose attendance before and after normal working hours is essential for the running of the undertaking and those whose working time includes periods during which they are not actually working may have their hours extended to not more than 10 a day; this provision did not appear in the previous legislation. When the daily working time exceeds 8 hours, it must be broken by one or two rest periods amounting in all to three-quarters of an hour; but an agreement to shorten the aggregate rest period to half an hour may be sanctioned. (Under the previous regulations, a mid-day pause of one hour was to be granted when working time exceeded 8 hours a day.) Each worker must be allowed a weekly rest period of at least 24 consecutive hours, to fall if possible on a Sunday or public holiday. Overtime may be worked in specified circumstances only, the maximum normally permissible for any one worker being 10 hours a week, subject to an absolute maximum of 30 hours in four consecutive weeks. The rate of payment for overtime must be at least 25 per cent. in excess of the usual wage rate. Work at night and on Sundays and public holidays is normally permissible only in undertakings with continuous processes and in other specified cases.

This section of the Act (dealing with the regulation of working hours) is not applicable to persons in positions of trust or authority, to commercial travellers and representatives, or to persons employed in forestry, marine salvage, the entertainment and hotel and catering industries, and educational establishments.

EMPLOYMENT OF CHILDREN AND YOUNG PERSONS.

The minimum age for the admission of children to employment in undertakings covered by the provisions of the Act which relate to working hours is fixed at 15 years, as compared with 14 years under the earlier legislation. The special limitations hitherto imposed on the employment of young persons between 14 and 16 years of age have been extended to those between 15 and 18 years of age: for

instance, in general, they may not be employed on overtime, Sunday, or night work in industrial undertakings.

ANNUAL HOLIDAYS WITH PAY.

All workers who have been employed continuously in the same undertaking for at least six months are to be granted annual holidays with pay. The duration of the holiday is to vary proportionately with the period of employment, on the basis of not less than 9 days' holiday for a full year's employment. For the period of his holiday, the worker is to receive pay calculated according to (a) his regular wage or salary in respect of employment for the normal number of hours, or (b), except as may be otherwise provided by agreement, his average earnings in respect of employment for the normal number of hours on a piece-work or other similar basis. The holiday period is to be fixed by the employer, and, as a rule, it must fall between May 15 and September 15 in each year.

DISMISSAL NOTICES.

Except as may be otherwise provided by written agreement between employers and workers, or by the works rules drawn up by the employer in consultation with representatives of the workers, the employment of a worker may not, in general, be terminated except by notice given by either party. The period of the notice is fixed at not less than 14 days in the case of workers employed at time or piece rates, and at not less than one calendar month in the case of workers who are remunerated on a monthly or yearly basis. Limited provision is also made for the payment of compensation in cases of unjustifiable dismissal.

OTHER PROVISIONS.

The Act also contains provisions relating to other aspects of labour protection hitherto regulated by the Factory Act, 1915: in particular, provisions respecting accident prevention and industrial hygiene, the establishment of workshop rules, the election in undertakings of workers' representatives, etc. Responsibility for ensuring the observance of the Act is vested in the existing factory inspection authorities and local Labour Committees. The Labour Council, originally established by the Factory Act, 1909, is to continue to function as an advisory body responsible for assisting the Government in all matters concerning factory inspection.

New Cotton Mills in Southern India.

In a recent issue of "Platt's Bulletin" attention is directed to the additions made in recent years to the cotton-spinning machinery in existence in the Coimbatore district of Southern India. The following firms are mentioned:—

- | | |
|---------------------------|------------------------|
| 1. Janardana Mills, Ltd. | 4. Murugan Mills, Ltd. |
| 2. Sri Sarada Mills, Ltd. | 5. Kamala Mills, Ltd. |
| 3. Pioneer Mills, Ltd. | |

Of the above mills only the Sri Sarada Mills weave their own yarn into cloth.

The mills for the most part vary between 6,000 and 12,000 spindles, set out for 20's to 40's counts.

Blow-room machinery on single process lines is universally adopted, with pneumatic carrying of cotton and electrical control to ensure fully automatic opening, cleaning and lap making.

High-draft ring spinning frames with four rows of rollers and all the latest mechanical and spinning improvements are generally adopted, including tape drive to spindles, spiral gearing for roller wheels, "D" type spindles, rising and falling lappets, and ball bearings to tin roller pedestals and sometimes also to jockey pulleys. The creels are generally arranged for double roving or single intermediate bobbins.

The tendency in India at present is to establish mills on or near the cotton fields, so reducing costs of transport and eliminating to a great extent costs of pressing and the necessity of reopening hard-pressed bales. Coimbatore is a good example of this tendency. Further, many of the mills or their managing agents have their own ginning factories where they can see that the ginning is properly done. Most of these ginning factories are equipped with roller gins, so that the cotton is supervised in every process from the fields to the bale of yarn or cloth. Many spinners grow a proportion of their cotton requirements in their own fields.

Coimbatore, besides enjoying the advantages of proximity to fields where Cambodia and Karunganni cottons are grown, now obtains electric power from the Pykara Hydro-Electric Scheme, which has greatly encouraged the establishment of new mills and enabled them to take full advantage of another of the chief modern tendencies in mill practice, namely individual electric motor drive for suitable machines.

All the recently erected mills have adopted individual electric motor drives for all machines except the carding engines, which are more conveniently driven in group form from a lineshaft. Blow-room machines are generally driven by motors placed on the floor; driving by belt, although the motors can in most cases, be mounted on the machines, is preferred, and can also be directly coupled to beater or cylinder shafts as is the most general practice with Crighton openers.

Drawing frames are most generally driven by fibre-gears to the undershaft from a motor placed on the floor or by V-rope drive, while the commonest drive for speed frames is by a motor placed on the headstock top and driving by belt over a tension pulley to the jack shaft.

Ring spinning frames are driven in this district usually by variable-speed motors coupled directly to the tin roller shaft. Other types of drive sometimes adopted are by motor mounted on the floor, or on a bedplate common to the motor and headstock, driving by three or four V-belts to the tin roller shaft, or alternatively by motor mounted on the headstock, and driving down inside buffets by belt over a tension pulley. In the latter case two speed pulleys are sometimes adopted.

Another modern tendency of which the Coimbatore Mills have taken full advantage is the building of one-storey mills, thereby reducing transport from process to process and consequently effecting savings in the costs of production. The machinery being arranged on the ground level has the mechanical advantage of working always on a solid foundation independent of the building construction. Due to this and to the absence of lineshafting, the

buildings themselves can be of much lighter construction than the normal old-fashioned type of mill building; all mills, however, are well designed and properly built. Moreover, light can be and is allowed to enter through roof windows as well as windows in the walls, so that the mills are much lighter than is the case with storeyed buildings.

Although the machinery is all arranged on one floor, divisions are made in the building to separate the machines into groups suitable for most efficient working. The most usual divisions are as follows:—

- | | |
|--|-----------------|
| 1. Mixing Room. | 4. Ring Frames. |
| 2. Blow Room. | |
| 3. Card Room, including cards, drawing and speed frames. | 5. Reels. |

In some cases the cards are placed in a room by themselves.

Millowners have built their mills of local stone, which blends itself into the countryside, in a number of well-balanced designs which combine good, clean and solid appearance with maximum utility. Added to this is the absence of tall chimneys and smoke, on account of the use of electricity. The consequence is that although Coimbatore alone now has 21 mills containing a total of approximately 310,000 spindles, within a radius of six miles, the town and its surroundings have not suffered the usual disfigurements accompanying the growth of a busy industrial area. This and the progressive ideas of the mills in machinery are matters for congratulation to all concerned.

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The Textile Industry of Chosen (Korea.*)

Since the amalgamation with Chosen took place in August 1910, twenty-six years have elapsed. All the industries in Chosen have made great progress during the last twenty years, and the present position of her textile industry is reported as follows in the latest return of the Central Experimental Institution of the Government-General of Chosen.

COTTON TISSUES.

Many new large cotton-spinning factories have lately been established, and the production of cotton tissues has greatly increased, without as yet being able to satisfy the demand, which still relies to a great extent upon imports. The following tables show the information in this connection:—

Years	Imports from foreign countries yen			Import from Japan- Proper yen	Import Total yen
1932	112,466			12,000,365	30,114,631
1933	17,138			43,785,348	43,802,486
1934	5,708			44,160,341	44,166,049

Years	Exports to foreign countries yen			Exports to Japan- Proper yen	Export Total yen
1932	5,901,381			605,700	6,507,081
1933	5,470,550			834,313	6,204,863
1934	5,584,203			913,495	6,497,698

Years	Production			Consumption
1932	14,201,770	yen		37,699,330 yen
1933	15,863,529			53,461,152 "
1934	20,781,351	"		58,449,702 "

COTTON SPINNING.

Since the Chosen Boshoku K. Kaisha commenced operations in 1922 the following cotton spinning companies have sprung into existence:—

Chosen Boshoku K. Kaisha, at Fusan; equipped with 39,776 spindles and 1,132 looms, and engaged in producing sheetings, dyed sheeting, jeans and dyed and bleached jeans.

Kanegafuchi Boseki Zennan Kojo, at Koshu; equipped with 50,560 spindles and 1,008 looms, and engaged in the production of sheeting and jeans.

Toyo Boseki Zinsen Kojo, at Zinsen; equipped with 34,488 spindles and 1,300 looms, and engaged in producing sheetings.

Keijo Boshoku K. Kaisha, Keijo; equipped with 21,600 spindles and 898 looms, and engaged in producing sheetings.

* Extracted from the *Journal of the Japan Textile Association*, November, 1936.

Chosen Menka Weaving Factory, at Mokuho; equipped with 158 looms to produce sheetings.

Thus 143,424 spindles and 4,496 looms all together are running at present in Chosen.

Production is divided into two categories, viz., factory production and domestic production, as follows:—

Categories		Broad width yen	Narrow width yen	Special tissues yen	Total yen
Factory production	..	14,176,199	316,575	4,595	14,597,369
Domestic production	..	50,663	6,196,853	36,466	6,285,982
Total .. ..	..	<u>14,226,862</u>	<u>6,513,428</u>	<u>41,061</u>	<u>20,781,351</u>

In general, broad width tissues are produced in the factories, while narrow width tissues are produced at home as farmer's sidelines.

CHINA.

The activity of the Shanghai cotton mills was greater in October than in September, and deliveries of cotton to Shanghai mills were reported to have been 136,000 bales higher. Japanese and some Chinese mills are reported to have booked considerable orders; current prices and spinners' margins are regarded as very satisfactory and higher than for some years. It is reported that Japanese cotton mills in North China are expanding, and a considerable increase in equipment is expected in Tientsin next year.

Practically all large Japanese-owned mills closed, owing to a dispute with some of the operatives, who demand a wage increase. Chinese-owned mills were not involved since they have already authorized some wage increases.

(United States Department of Commerce.)

ENGLISH COTTON AND RAYON INDUSTRY CENSUS OF PRODUCTION, 1935 (PRELIMINARY REPORT).

A recent issue of the *Board of Trade Journal* contains a supplement giving a preliminary report on the results of the census of production for 1935 in the cotton spinning, doubling, and weaving, jute, linen, and hemp, and silk and rayon industries. Since the previous census was taken, in 1930, inquiries into the production of these and other trades have been held under the Import Duties Act, so that the figures for 1935 can be compared with some for 1934 and 1933, as well as with some for 1930, thus showing whether much progress has been made year by year recently. Some of the principal figures for the cotton spinning and manufacturing industries are shown in the following table:—

	*1935	†1934	†1933	*1930
Cotton spinning :				
Gross output (£1,000)	74,073	71,321	67,575	78,624
Net output (£1,000)	20,147	20,554	19,589	19,828
Average number employed ..	182,153	183,750	183,779	190,736
Net output per person employed (£)	111	112	107	104
Output of single yarn (1,000,000 lbs.)	1,224·6	1,205·3	1,179·6	1,047·1
Cotton weaving :				
Gross output (£1,000)	68,809	67,593	65,126	73,913
Net output (£1,000)	20,334	20,558	20,052	22,065
Average number employed ..	165,791	171,352	175,985	188,699
Net output per person employed (£)	123	120	114	117
Output of piece goods (1,000,000 sq. yds.)	3,312·2	3,417·6	3,458·5	3,373·7

* Census of production.

† Import Duties Act Inquiry.

In the rayon industry, the following table shows the output of rayon goods:—

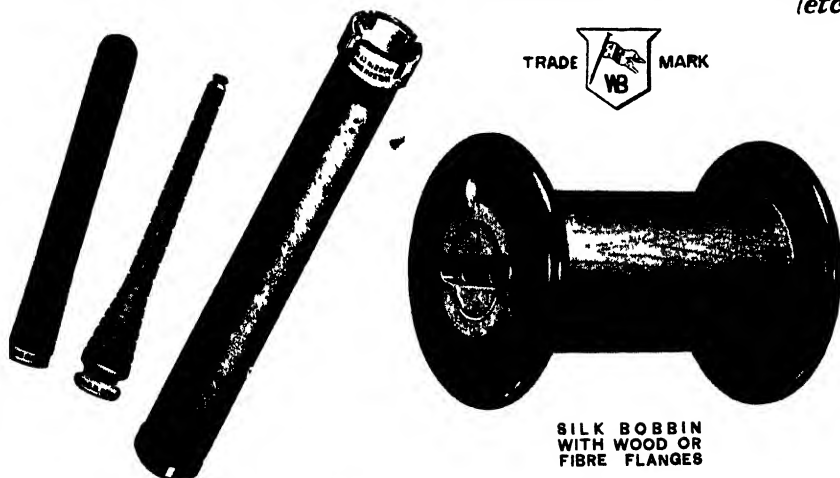
	(000,000's omitted)			
	*1935	†1934	†1933	*1930
Rayon yarn (lb.)	111·9	90·3	82·3	50·0
Staple fibre and waste (lb.)	12·5	4·8	4·5	2·6
Piece goods (sq. yds) :				
Wholly of rayon	272·2	213·0	147·4	59·3
Mixtures	151·8	186·6	221·7	120·9

* Census of production.

† Import Duties Act Inquiry.

It is reported that the Ceylon Government intends to establish in the near future five State-owned textile mills in the island.

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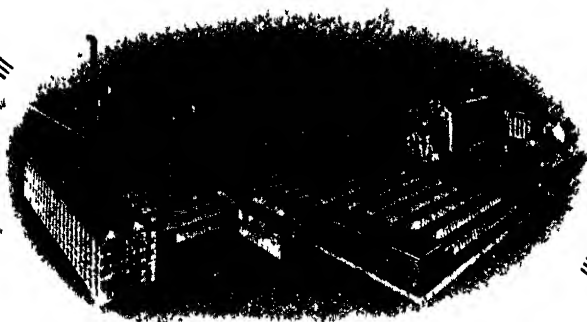
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COMMERCIAL POLICIES OF COUNTRIES IMPORTING COTTON GOODS.

The following quotation is taken from a report entitled "The Changing Conditions of World Trade in Cotton and Rayon Goods," published by the Joint Committee of Cotton Trade Organizations:—

Until 1931 the Customs tariff was the principal instrument for the control and restriction of international trade. Since 1931 it has been increasingly superseded by other weapons, notably quotas and control of foreign exchange. But in most countries, including a few in Europe, most of the South American republics, and the markets of Africa and the East, the tariff retains its importance. The tendency for the general raising of tariffs since the war, and especially since 1929, is illustrated by the following comparison of the duties payable on a standard type of cotton piece goods (printed plain, weighing 100 grammes per square metre—5.4 square yards per pound—with 35 threads in a square of 5 millimetres side). The duties, where specific, have been converted to their equivalent in English currency, and in order to emphasize some of the more important reservations the existence of quota or exchange restrictions has been indicated:—

COTTON PIECE GOODS, PRINTED

DUTY PER CENT. OR PENCE PER LB.

	1914	1924	1929	1936
Holland	5%	5%	8%	10%Q
Germany	5.4	5.9	8.0	23.0E
Belgium	3.5	2.9	4.5	9.2
Switzerland	2.6	--	-	14.3
Denmark	4.8	4.1	5.7	4.1E
Greece	4.1	4.5	4.5	9.25Q
Roumania	4.7	5.4	14.5	38.0E
Turkey	11%	3.7	3.0	33.5E
*China	2.9	7.7	10.3	23.1
Dutch East Indies	6%	10%	10%	18%Q
French West Africa	4.0	3.9	3.5	15.4Q
Egypt	8%	8%	8%	7.3
Belgium Congo	10%	15%	18%	10%
†U.S.A.	20%	40%	40%	32.1%
Argentina	5.0	8.7	9.9	6.2E
Colombia	13.7	16.8	15.0	9.8E
Chile	8.8	9.0	16.8	44.1E
Brazil	27.2	27.2	26.9	38.2E

E Exchange restriction.

Q Quota restriction.

*China: Figures for 1914, 1924, and 1929 are per piece not exceeding 40 in. wide by 40 yds. long.

†U.S.A.: 1924 11.7d. per lb. and 1929 10.8d. per lb., but not less than 40% *ad valorem*.

COTTON ROADS IN U.S.A.

Cotton fabrics designed by workers of the Bureau of Agricultural Economics and North Carolina State College are being used in road-building experiments in 24 States to develop new and extended uses for cotton.

The cotton fabrics will be used to reinforce nearly 600 miles of bituminous-surfaced roads in the various states. The objective is to reduce road maintenance costs and to expand the domestic market for cotton.

The behaviour of the roads will be recorded scientifically under all sorts of traffic conditions, and the question settled as to the physical and economic value of this type of road. The effort of the Bureau of Agricultural Economics has been to design a low-cost high-quality fabric for these tests. The quantity of cotton required to manufacture the materials developed by the Bureau varies from five to eight bales per mile of road. (*Acco Press.*)

THE AMERICAN TRADE DELEGATION TO JAPAN.

The American economic mission under the leadership of Mr. Claudius T. Murchison, President of the U.S. Cotton Textile Institute, which is to discuss steps to readjust U.S.-Japan cotton trade relations, arrived at Yokohama on January 8.

(*The Textile Weekly.*)

Reviews on Current Cotton Literature.

“DIE LAGE DER ENGLISCHEN BAUMWOLLINDUSTRIE, KONKURRENZVERHÄLTNISSE UND SANIERUNGSMÖGLICHKEITEN,” by Dr. Armin Spälty, Secretary of the Schweizerischer Spinner-, Zwirner- und Weber-Verein.

An interesting description of the development and trend of the Lancashire cotton industry both before and after the war, as seen through Continental eyes. The author emphasizes the fact that, in his opinion, Lancashire has not exploited the possibilities of the ring spindle to the extent that she might have done. He also ascribes the post-war depression in the Lancashire industry to the following factors:—

- (a) The Indian situation.
- (b) High taxation.
- (c) Rigid trade union regulations, which prevented complete rationalization of the industry.

All these facts have tended to increase Lancashire's costs of production.

The book is printed in the German language.

"SKINNER'S COTTON TRADE DIRECTORY OF THE WORLD, 1936-37." The fourteenth issue of this world-famous work of reference has recently made its appearance. The customary revision of details, in collaboration with the leading textile associations throughout the world, has been carried through, and valuable additions have been made to the information previously published. In particular, the editorial relating to foreign companies has been considerably augmented, a feature which will undoubtedly appeal to users of the Directory. Besides being a directory of cotton spinners, manufacturers, doublers, finishers, particulars are also given concerning raw cotton merchants and exporters in all parts of the world, cotton compresses and warehouses, waste merchants, silk and rayon producers, hosiery and knit goods (British) manufacturers, and firms dealing in mill supplies.

"THE EGYPTIAN YEAR BOOK, 1935-36." Edited by Mr. George Pilavachi, Alexandria.

Once again Mr. Pilavachi is to be congratulated upon the production of a work which constitutes not only an excellent reference book on Egyptian cotton matters on account of the valuable statistical data which it contains, but also a very interesting collection of articles on current aspects of Egyptian cotton. Of particular interest is an article by the editor himself on the Breeding and Propagation of New Cotton Varieties in Egypt, wherein he gives the history of most of the better known varieties of Egyptian cotton, past and present, and the ones which, in his opinion, promise best for the future. He does not hesitate to criticize some of the existing varieties, and gives his reason for so doing. Other items of note are "The Yarn Strength of Egyptian Cottons," by Mr. H. A. Hancock, B.Sc., "Bahtim Abiad" (White Cotton), by Fouad Bey Abaza, "The Tendering of Egyptian Cotton in Liverpool," by Mr. A. N. Boumphrey, "The Necessity of a New Long-staple Cotton Contract on the Alexandria Futures Market," by Ali Bey Emine Yehia.

An excellent series of photographs of pressing establishments, farfaras and ginneries form a striking feature of the book.

"COTTON YEAR BOOK OF THE NEW YORK COTTON EXCHANGE, 1936." This excellent cotton reference book, prepared under the direction of Mr. Alston H. Garside, Economist of the Exchange, contains comprehensive statistics on world supply and world distribution of American and outside growths of cotton, prices of cotton, yarn and cloth, mill activity, and other data of interest from a cotton market standpoint.

"WORLD PRODUCTION AND PRICES, 1935-36," published by the Economic Intelligence Service of the League of Nations, Geneva.

This tenth survey of world production and prices contains a revised world index of primary production as well as a new world index of industrial activity. The first section of Chapter I is concerned with the production and stocks of primary products, the

second with industrial activity in general, the third with the activity of individual industries and statistical tables in this chapter cover the period 1925-35 (1925-26 to 1935-36), the observations in the text refer mainly to 1935 and the early part of 1936.

In Chapter II, a comparison is made of the quantitative changes during recent years in production and trade. Chapter III contains a study of recent price tendencies.

"REVIEW OF WORLD TRADE, 1935," published by the Economic Intelligence Service by the League of Nations, Geneva.

This year's edition of the "Review of World Trade" contains a general synopsis of world trade during 1935 and a comparison of the figures for that year with those for the immediately preceding years. As in the last edition, special attention has been paid to the effects of recent currency developments and to the current tendency to develop reciprocal trade at the expense of multilateral trade.

OTHER BOOKS RECEIVED.

"THREE BULLETINS CONTAINING DETAILS OF EXPERIMENTS IN EGYPT ON THE INTERACTION OF FACTORS IN CROP GROWTH," by Messrs. Frank Crowther, Adolf Tomforde and Ahmed Mahmoud; published by the Royal Agricultural Society of Egypt, Cairo.

"BOMBAY: THE GATEWAY TO INDIA," issued by the Rotary Club of Bombay (kindly forwarded by Mr. Chunilal B. Mehta).

"QUELQUES DONNÉES SUR L'EXPÉRIMENTATION COTONNIÈRE," by M. R. Pittery. Published by l'Institut National pour l'Etude Agronomique du Congo Belge.

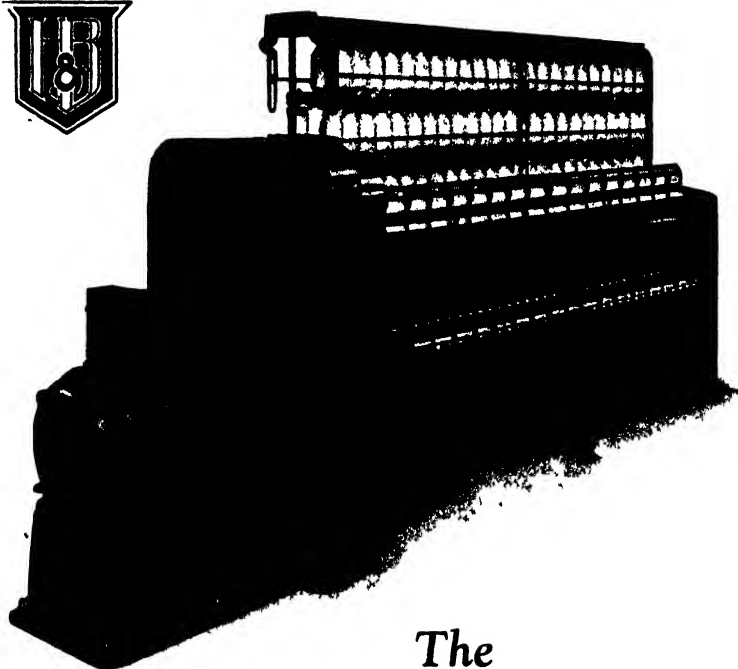
"INDIAN COTTON REVIEW, 1935-36." Published by Messrs. Chunilal Mehta & Co. Ltd., of Bombay.

"REPORT ON ECONOMIC AND COMMERCIAL CONDITIONS IN BELGIUM IN 1935," by the Commercial Counsellor to H.M. Embassy at Brussels, together with an annex on the Grand Duchy of Luxemburg, by H.M. Consul, Luxemburg. Printed and published by H.M. Stationery Office for the Department of Overseas Trade. Price 2s. net.

"BRITISH TRADE IN NORTHERN EUROPE." Published by the Advertising Association, 110, Fleet Street, London, E.C.4. Price 5s.



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We have pleasure in placing on record our appreciation of the Meynell Washer Top Roller, the results obtained therefrom, during an extensive and prolonged test, being such as to warrant a complete change over the whole of our Ring Frames.

It has been our experience that the claims made for the Washer Top Roller have been in no way exaggerated, and the results have fully justified all that has been written by the Maker in favour of the Roller.

We have no objection to your publishing this testimonial provided our name does not appear in connection therewith, but you are at liberty to exhibit this letter, in original, to any one who may doubt the veracity of this testimonial or of the results to be obtained by the use of our Washer Top Roller.

Yours faithfully,
(Signed) General Manager.

HJ/JSB.

From FRANCE.

le 27 Janvier, 1936.
Maison Henry Meynell & Co.,
Accrington.

Messieurs,

En possession des rouleaux commandés, nous avons desuite fait des essais, à la suite desquels nous venons vous dire que nous serions acheteurs de 10,000 pièces pour commencer, dont nous vous confirmerons livraison à condition.

Dans l'attente de votre accord, nous vous présentons Messieurs nos sincères salutations.
(Signed)

From FRANCE.

17th February, 1936.
Messrs. Henry Meynell & Co., Ltd.,
Accrington.

Dear Sirs,

Établissements — France.

These clients are satisfied with the W.T. Rollers invoiced by you on 7th October last for one frame, and they have decided to apply your rollers on the other frames. Please note, therefore, their order for — W.T. Rollers similar to those previously supplied. Invoicing and forwarding instructions as those before.

Yours truly,

From FRANCE.

17th April, 1936.
Messrs. Henry Meynell & Co., Ltd.,
Accrington.

Dear Sirs,

We beg to acknowledge receipt of your esteemed letter of the 10th inst., concerning the Meynell High Drafting.

We have made tests of this process, and can tell you that we would agree to a contract with you on condition that you supply your material at the price of — per spindle.

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From LANCASHIRE.

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Messrs. Henry Meynell & Co., Ltd.,
Avenue Parade,
Accrington (Lancs.).

Dear Sirs,

We enclose herewith a further order for one frame of 360 spindles. Meynell's Washer Top Roller High Draft to be delivered to our — Mill.

You will be pleased to know that in all our trials the Meynell Roller has given every satisfaction, and from time to time we hope to place repeat orders, but in the present state of trade you will understand this must necessarily be slow.

Yours faithfully,

Since the above order we have received another repeat order, making the fifteenth repeat order from this Lancashire mill.

From MEXICO.

March, 1936.
Messrs. Henry Meynell & Co., Ltd.,
Accrington, England.

Dear Sirs,

We are pleased to inform you that the Meynell High Draft has made a hit, and we shall continue to install Meynell's.

Herewith an order for further 5,000 spindles to be delivered as early as possible.

Yours truly,

From INDIA.

3rd September, 1935.
Messrs. Hy. Meynell & Co., Ltd.,
Accrington (England).

Dear Sirs,

With reference to our trial order of the 3rd May, 1935, these Rollers have been received, are running, and we are pleased with the results obtained.

We shall be glad, therefore, if you will kindly give us your very lowest quotation f.o.b. Liverpool for converting—

21 Twist Ringframes—440 spindles and

24 Weft Ringframes—488 spindles.

Your early advice in this connection per Air Mail will be appreciated.

Yours faithfully,

Business since booked.

From ENGLAND.

April 23rd, 1936.
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Dear Sirs,

Further to your letter of the 21st inst., we have noted your remarks with reference to the Ball-Drags.

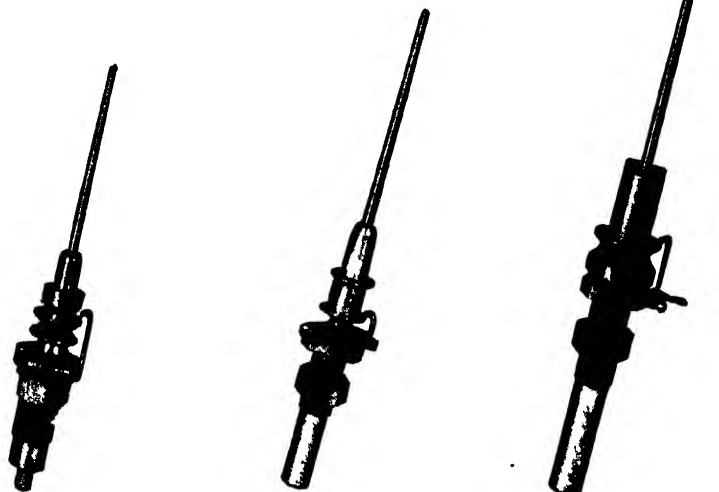
We herewith enclose an order for 3,600 No. 2 Ball-Drags with 17/32 in. Steel Balls, price and delivery as quoted in your letter.

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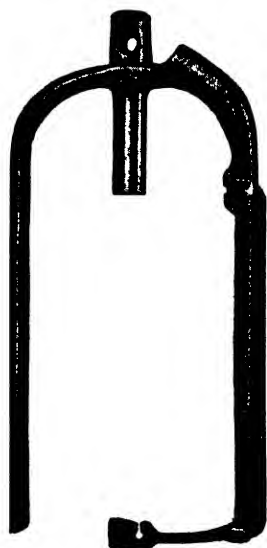
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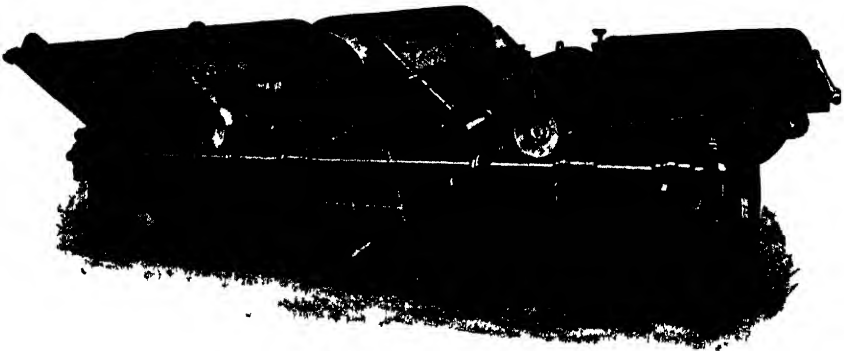
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(International Cotton Bulletin, No. 44)									
1935—ITALY (Milan-Rome)	0	10	0
(International Cotton Bulletin, No. 52.)									

All other Congress Reports are out of print.

Other Publications.

REPORT ON THE COTTON INDUSTRY OF INDIA (1930) Arno S. Pearse	1	1	0
REPORT ON THE COTTON INDUSTRY OF JAPAN AND CHINA (1929), Arno S. Pearse
COLUMBIA, WITH SPECIAL REFERENCE TO COTTON (1926). Arno S. Pearse
EGYPTIAN COTTON CONFERENCE REPORT (1927)
INDIAN COTTON (1913-14)). Arno S. Pearse
BRAZILIAN COTTON (1921-22). Arno S. Pearse
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International Federation of Master Cotton Spinners' and Manufacturers' Associations.

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COMMITTEE'S COMMUNICATIONS.

XVIII International Cotton Congress, Cairo & Alexandria

ALTERATION OF DATE

MEMBERS and Associate Members are asked to note that the above Congress will be inaugurated in Cairo on January 26, 1938, and not in December, 1937, as had previously been announced, owing to the fact that another large congress will be in progress at that time.

The details are at present being formulated by the Egyptian Sub-committee, and it is hoped to publish them in complete form in the next issue of the INTERNATIONAL COTTON BULLETIN, in July of this year.

We expect to obtain from Congress delegates substantial concessions in the shape of reduced rates, from the railways, the steamship companies and the hotel proprietors in Cairo and Alexandria.

Particulars of these concessions will be announced later.

MEETING OF THE INTERNATIONAL COTTON COMMITTEE

The next meeting of the International Cotton Committee will take place on May 4, 1937, in Amsterdam. Among the subjects to be discussed are the following:—

- (1) The arrangements for the International Cotton Congress to be held in Egypt in January, 1938.
- (2) The Standardization and Unification of textile terms and testing methods.
- (3) Report by delegates to the Washington Tripartite Conference.

COTTON BALE ENQUIRY

An enthusiastic reception was given by the press of various countries to the result of the cotton bale enquiry published in the January issue of the INTERNATIONAL COTTON BULLETIN.

Additional information is still being received and will be published as soon as all the returns are to hand.

INTERNATIONAL COTTON LOOM CENSUS.

The third International Cotton Loom Census as of December 31, 1936, is well under way and it is hoped to publish the same in the July issue of the INTERNATIONAL COTTON BULLETIN.

COTTON PROGRESS IN BRAZIL.

Attention is drawn at the end of the book to the publishers' notice of the Federation's latest publication. The MSS. of this book is now in the hands of the printer, and it is expected that copies will be available in a few weeks' time.

HERR ROBERT VON SZURDAY.

The Magyar Textil Országos Egyesülete (the Hungarian Master Cotton Spinners' and Manufacturers' Association) celebrated, on March 12 last, the sixtieth birthday of Herr Robert von Szurday, President of the Association and member of the Hungarian Reichstag; this day coincided with his retirement from the General Management of the Hungarian Cotton Industries Ltd., whose Vice-President he remains.

Herr Robert von Szurday has been a member of the International Cotton Committee since 1925 and President of the Hungarian Association for many years.

During his youth Herr von Szurday conceived the idea of a world tour, in which, among other countries, he visited China and Japan. After his return he found the family business in a very difficult position, as this was the critical period of the Hungarian Textile Industry, but owing to his energy and hard work, Herr von Szurday brought the company (Ungarischen Baumwollindustrie A.G.) to its present leading position in that country. To-day this organization is the largest in Hungary, having 55,000 cotton-spinning spindles and also weaving, printing and finishing departments.

During this time he has consolidated the Hungarian textile industry under his able leadership of the Association.

Herr von Szurday was unfortunately not able to leave his home on the day he reached his sixtieth birthday owing to illness, but a deputation from the Hungarian Association visited him in order to bestow upon him the cotton industry's greetings and best wishes and to present him with a specially bound copy of Paul Böhm's "Zigeuner Szene."

Herr von Szurday's many friends will be glad to learn that he has quite recovered from his recent illness, and will shortly resume his business activities.



AUSTRIA.

SPINNING SECTION.

The degree of occupation in the spinning section during the last quarter of 1936 and also in January, 1937, has remained comparatively stable and has permitted a 97 per cent. to 98 per cent. of full-time running calculated on the single shift. Since February, however, slight retrogression in the working of the mills is noticeable, which has been brought about by new export difficulties, especially in trade with Roumania.

There are no figures available so far for the months of February or March, but there is no doubt whatsoever, that in the first-named month a reduction in production will be found, and this will not be an improvement. Nevertheless, the export statistics for the month of January in regard to cotton yarn show 9,249 quintals as against 12,676 quintals in the same month of the previous year. This is a 27 per cent. reduction. A still more important reduction is noticeable in the receipt of orders but, as already mentioned, figures for the last two months are not available.

WEAVING SECTION.

Occupation of the factories until the month of January inclusive was quite normal; approximately 96 per cent. of the looms capable of being worked were running on single shift. Nevertheless, this activity was not equally distributed, as 25 per cent. of the looms were being worked in two shifts while 30 per cent. were stopped.

In the last two months, for which no figures are available as yet, the degree of occupation should show no considerable alteration although the order books show an increase in demand. This activity in demand is chiefly drawn from the retail trade and was intended to cover the requirements of the middle-men and the making-up industries.

This increase of demand chiefly applied to goods in stock and was a result of the merchants and clothing manufacturers buying supplies in advance, and this again had its cause in the production and price agreement of the cotton weavers which had been concluded in the meantime. The increase in orders for future delivery, is spread over a good many delivery months and might, therefore, not give rise to any important increase in the production. Taking the aforementioned advance buying into consideration, it may be anticipated that we shall have less business for the next few months. The agreement of the cotton-weaving mills is based

on limiting production by means of a quota establishing a uniform basis for the prices of grey and finished goods, whilst the regulations for fancy woven goods up to now only prescribed raising the price of the grey goods by the increased cost of production without having fixed this increased cost to an exact amount. That this agreement should come into force, was absolutely necessary for the further existence of a large part of the mills which, owing to the price dumping that has gone on for years, had almost completely lost their business. It is expected that this agreement, after a transitional period which must result from the stocks kept by the buyers, i.e., the advance buying, will lead to a stable price foundation that will ensure production costs.

These orders which are intended for the finishing industry are split up over several months of delivery and should therefore not influence the degree of occupation considerably. During the next few months it is anticipated that a certain slackening will take place.

The imports of cotton goods during January of this year are not very much altered from those of previous years, as can be seen from the table of imports shown in the original report quoted below.

As regards wages, no alteration of any importance has taken place in the spinning and weaving sections during the last few months.

The following is the original report in German:—

BAUMWOLLSPINNEREI.

Die Beschäftigungslage der Spinnereien ist im letzten Quartal 1936, sowie im Januar 1937 ziemlich stabil geblieben, und ermöglichte eine 97-98 %ige Ausnützung der Spindeln, gerechnet auf einfache Schicht. Seit Feber ist ein Rückgang in der Beschäftigung zu verzeichnen, welcher sich aus neu entstandenen Exportschwierigkeiten, namentlich im Verkehr mit Rumänien ergab. Es liegen wohl ziffernmässige Angaben für die Monate Feber und März noch nicht vor doch ist anzunehmen, dass schon im erstgenannten Monat eine Einschränkung der Produktion in nicht unerheblichem Ausmasse stattgefunden hat. Jedenfalls zeigt bereits die Aussenhandelsstatistik des Monates Januar, dass die Ausfuhr von Baumwollgarnen auf 9,240 q. gegenüber 12,676 q. im gleichen Monat des vorausgegangenen Jahres, demnach um 27 % zurückgegangen ist. Ein noch stärkerer Ausfall hat sich im Order-Einlauf ergeben, doch liegen hierüber die Ziffern für die 2. letzten Monate noch nicht vor.

BAUMWOLLWEBEREI.

Die Beschäftigung der Betriebe war bis zum Monate Januar (einschliesslich) eine normale, was in der Tatsache zum Ausdruck kommt, dass cca. 96 % der betriebsfähigen Webstühle auf Basis einfacher Schicht gelaufen sind. Allerdings war diese Beschäftigung nicht gleichmässig verteilt, da ca. ein Viertel der Stühle in 2 und mehr Schichten betrieben wurden, während cca. 30 % der Stühle abgestellt waren. In den beiden letzten Monaten, für welche noch keine Ziffern vorliegen, dürften die Beschäftigungs-

verhältnisse keine wesentliche Veränderung erfahren haben, obwohl der Auftragseingang ein gesteigerter war. Diese Belebung der Nachfrage hat sich hauptsächlich auf Lager - Ware bezogen und war bedingt durch Vordeckungen des Zwischenhandels und der Konfektion, die wieder in dem inzwischen abgeschlossenen Produktions- und Kalkulationsüberereinkommen der Baumwollwebereien ihre Ursache hatten. Jener Teil der Verkaufssteigerung, der auf Anfertigungsaufträge entfällt, verteilt sich auf eine lange Reihe von Liefermonaten und dürfte daher zu keiner wesentlichen Produktionssteigerung veranlassung geben. Für die nächsten Monate ist mit Rücksicht auf die erwähnten Vordeckungen mit einem äusserst stillen Geschäftsgang zu rechnen. Das Übereinkommen der Baumwollwebereien beruht auf einer Kontingentierung der Erzeugung unter Festlegung von einheitlichen Grundlagen für die Kalkulation von roher und veredelter Ware, während die Bestimmungen für buntgewebte Waren vorerst nur die Berechnung der gegenüber der Rohware erhöhten Erzeugungskosten vorschreiben, ohne dass aber diese Mehrkosten genau festgelegt wären. Das Zustandkommen dieses Übereinkommens war eine Notwendigkeit für den Weiterbestand eines Grossteils der Betriebe, die infolge des seit Jahren anhaltenden Preisdruckes ihre Rentabilitätsgrundlage bereits vollständig eingebüsst hatten. Es wird erwartet, dass dieses Übereinkommen nach jener Uebergangszeit, welche sich aus den bei den Warenbeziehern vorhandenen Lagerbeständen, bzw. aus den Vordeckungen zwangsläufig ergeben muss, zu einer stabilen und die Gestehungskosten sichernden Preisbildung führen wird.

Die Einfuhr von Baumwollgeweben war im Januar d.J. nicht wesentlich verschieden von den Importen im gleichen Monate des Jahres 1936, was aus den folgenden Ziffern zu ersehen ist:—

EINFUHR IN METERZENTNERN—IMPORTS

	1937	1936
Rohgewebe (<i>Grey goods</i>)	1,749	1,744
Gebleichte Gewebe (<i>bleached</i>)	266	114
Gefärbte Gewebe (<i>dye'd</i>)	76	70
bedruckte Gewebe (<i>printed</i>)	67	46
buntgewebte Gewebe (<i>coloured woven</i>)	91	109
zusammen Total	<u>2,249</u>	<u>2,083</u>

Was die Lohnverhältnisse betrifft, so haben sich weder in der Spinnerei noch in der Weberei in den letzten Monaten irgendwelche Veränderungen von Bedeutung ergeben.

(*Verein der Baumwollspinner und Weber Oesterreichs, Wien.*)

BELGIUM.

Recent statistics show that at the end of the year 1936, the Belgian cotton industry was working at greatly enhanced activity.

Exports of cotton cloth increased to 33,500 tons, as against 26,900 tons in 1935, 44,000 tons in 1929, and 43,900 tons in 1928.

Exports of cotton yarns of all kinds increased to 10,000 tons,

as against 8,200 tons in 1935, 6,900 tons in 1929, and 8,600 tons in 1928.

A rise in the price of raw cotton which took place at the end of the last quarter of 1936 and the increased price of yarns have induced buyers to give orders in such quantities that the Association of Spinners is now well supplied. Stocks of yarns in spinners' hands continue to be absorbed little by little.

Wages have not been altered since January.

The original report in French runs as follows:—

Les récentes statistiques montrent qu'au cours de l'année 1936, l'industrie cotonnière belge a fait preuve d'une grande activité.

Les exportations de tissus de coton se sont élevées à 33,500 tonnes, contre 26,900 tonnes en 1935, 44,000 tonnes en 1929, et 43,900 tonnes en 1928.

Les exportations de fils de coton de toute nature se sont élevées à 10,000 tonnes contre 8,200 tonnes en 1935; 6,900 tonnes en 1929, et 8,600 tonnes en 1928.

Les hausses du coton brut qui ont eu lieu au cours du premier trimestre de 1937 et l'augmentation du prix des filés ont incité les acheteurs à passer des ordres de sorte que le carnet des filatures est bien garni. Les stocks de filés détenus par les filateurs continuent à se résorber peu à peu.

Les salaires n'ont pas été modifiés depuis janvier.

(Association Belge des Filateurs de Coton.)

BRAZIL.

Production of cotton yarn in Brazil approximates 114,000,000 kilograms (251,000,000 lbs.) a year, on the basis of an average of 20's, according to estimates of the Cotton Spinners' and Weavers' Association. Existing spinning equipment has been unable to meet the steadily increasing demand for yarns, particularly for 50's and finer counts, it is claimed. Well-informed textile men state that much of the spinning equipment now in use is very old, inefficient, and unsuited to current needs. The trend of demand is said to be more and more toward better grade fabrics requiring the finer counts. The lack of an adequate supply of such yarns has made it necessary for many of the larger knitting and weaving mills to import their requirements in order to maintain the heavy production schedules occasioned by the almost unprecedented demand of the past two years. Most of the yarns imported during the past year by weaving mills was of British origin (spun from Egyptian cotton), while hosiery mills purchased considerable quantities of fine-count mercerized yarns from the United States.

The inability of the Brazilian spinning mills to keep abreast of the steadily increasing demand is expected to result in marked expansion of spinning capacity during the present year. Under date of December 14, 1936, the Federal Ministry of Labour, Industry, and Commerce issued a circular which modifies certain provisions of Decree No. 23,486 of November 22, 1933, which restricted

the importation of machinery for use by the textile industry and certain other industries regarded as being in a state of over-production. Space limitations preclude publication of the details of the new circular which will permit importation of new spindles to the extent of 15 per cent. of the installed spindles in the country, estimated by the Cotton Spinners' and Weavers' Association at 2,700,000. The imported spindles are to be used only in the production of 60's (English counts) average or higher counts. The Association estimated that the importation of the permitted 400,000 spindles will add less than 5,000,000 kilograms annually to the country's total yarn output.

Although lack of facilities for spinning high counts is primarily responsible for the expected additions to equipment, labour legislation is a contributing factor. A law enacted during the past year prohibits the employment of minors (under 18 years of age) on night shifts. The enforcement of this provision of the law will curtail production in many mills which have been operating their spindles 24 hours a day in order to turn out the yarn needed for their weaving requirements. Many of these establishments are expected to increase their spindle capacity or to replace old equipment with more efficient spinning units.

(United States Department of Commerce.)

ENGLAND.

SPINNING SECTION.

The state of trade in practically all sections of the cotton spinning and manufacturing industry of Lancashire has continued to improve during the last few months.

Generally speaking, one could say that at running mills, as distinct from those entirely closed down, productivity approaches 95 per cent. of capacity.

There is being experienced, however, considerable difficulty arising from the shortage of juvenile labour.

Much of the improvement in trading conditions is claimed to be arising from the fact that some 75 per cent. of spinners are working under minimum price legalized or semi-legalized agreements, and these are operating to the satisfaction of everyone concerned.

MANUFACTURING SECTION.

During the last few months, activity of business in the manufacturing section has shown a welcome upward tendency. The flow of orders has been somewhat brisker and prices have not been so unsatisfactory, no doubt reacting to the general improvement in industry. The mills have been working at a higher percentage of capacity.

Nevertheless, the improvement in trade has not been equally applicable to all sections of the weaving trade, and has not had so marked an effect on many manufacturers as it has had in the spinning section, as cloth prices have not had the stability of yarn prices, but the present situation is more satisfactory than it has been for some time.

COTTON GOODS EXPORTS FROM ENGLAND
(000's omitted.)

				March, 1937	February, 1937	March, 1936
Yarn, grey ..	..	..	.. (lb.)	13,550	11,132	11,746
„ value	..	..	.. (£)	1,084	893	868
Yarn, other	..	..	.. (lb.)	1,702	1,443	1,593
„ value	..	..	.. (£)	168	145	152
Piece-goods—						
Grey ..	..	..	(sq. yds.)	30,024	27,252	29,229
„ value	..	..	.. (£)	455	417	407
Bleached ..	..	..	(sq. yds.)	55,975	49,884	55,420
„ value	..	..	.. (£)	996	908	933
Printed ..	..	..	(sq. yds.)	37,224	32,342	34,496
„ value	..	..	.. (£)	906	798	814
Dyed ..	..	..	(sq. yds.)	45,186	41,642	45,371
„ value	..	..	.. (£)	1,221	1,133	1,146
Coloured ..	..	..	(sq. yds.)	10,162	9,297	8,823
„ value	..	..	.. (£)	298	272	244
Total ..	..	..	(sq. yds.)	178,571	160,417	173,339
„ value	..	..	.. (£)	3,877	3,528	3,544
All cottons ..	..	..	.. (£)	6,017	5,325	5,349

Yarn exports for the first quarter of the year were 41,587,800 lbs., as compared with 39,731,200 lbs. in the corresponding period of last year, and piece goods exports were 499,611,000 sq. yds., against 509,467,000 sq. yards.

FRANCE.

The degree of activity reported in the last issue of the INTERNATIONAL COTTON BULLETIN has been maintained during the first two months of this year.

On the other hand, during the latter part of the quarter under review, a slight retrogression has been noticed in demand, both in the spinning and weaving sections.

By reason of the orders in hand, this slackening off in demand has not yet had any repercussion on the activity of the manufacturers, and they have not had any reason to adopt short time. It should be mentioned, however, that a certain number of mills are completely stopped, and these have not yet been started up. Taking into account these mills and other equipment which for some reason or other has not been run; at the end of February the degree of activity of the mills was estimated at about 85 per cent. for both the spinning and weaving sections.

It should be mentioned, at the same time, that this percentage has been calculated on a working week of forty hours, and that the application of this law since January 1, 1937, has reduced the productive capacity of the French cotton industry by 16.66 per cent.

An increase in wages of Frs.0.30 per hour has been granted to adult operatives in the cotton industry in the Vosges district. The figures of imports and exports for cotton yarn and cloth will be found in the original report in French printed below:—

L'activité signalée dans le dernier numéro du Bulletin International s'est maintenue pendant les deux premiers mois de l'année,

puis pendant la dernière partie du trimestre en revue il s'est produit un ralentissement marqué de la demande aussi bien en filature qu'en tissage.

En raison des ordres en carnet, ce ralentissement n'a encore eu aucune répercussion sur l'activité des manufactures et il n'est pas pratiqué de short-time. — Il y a lieu cependant de signaler qu'un certain nombre d'usines complètement arrêtées n'ont pas encore été remises en marche. — Compte tenu de ces usines et de l'outillage qui pour une raison quelconque n'avait pu être maintenu en marche, fin février le degré d'activité des manufactures pouvait être évalué environ à 85 pour cent la filature et le tissage. — Il y a lieu toutefois d'ajouter que ce pourcentage est calculé pour une durée de travail de 40 heures par semaine et que l'application de cette mesure à partir du 1er janvier 1937 a réduit de 16.66 pour cent la capacité de production de l'industrie cotonnière française.

Une augmentation de salaires de Fr.0.30 l'heure a été accordée aux ouvriers adultes dans l'industrie cotonnière de la région des Vosges.

IMPORTATIONS ET EXPORTATIONS.

IMPORTS AND EXPORTS.

						Années	
						Years	
						1935	1936
						Quintaux	Métriques
						Metric quintals	
A—Importations : (<i>Imports</i>)							
1.	Fils de Coton	..	..	..	..	4,690	6,822
	(<i>Cotton Yarns</i>)						
2.	Tissus de Coton	..	..	..	..	9,497	9,863
	(<i>Cotton Cloth</i>)						
B—Exportations : (<i>Exports</i>)							
1.	Fils de Coton : Exportations totales			..		80,005	61,442
	(<i>Cotton yarns—total exports</i>)						
	Destinations	(Countries of Destination)					
	Algérie, Colonies et Pays de Protectorat			..		19,862	22,806
	(<i>Algeria, Colonies and Protectorates</i>)						
	Marchés étrangers	..	..	..	..	60,143	38,636
	(<i>Foreign Markets</i>)						
2.	Tissus de Coton : Exportations totales			..		389,405	398,784
	(<i>Cotton cloth—total exports</i>)						
	Destinations :	(Countries of Destination)					
	Algérie, Colonies et Pays de Protectorat			..		356,815	372,213
	(<i>Algeria, French Colonies and Protectorates</i>)						
	Marchés étrangers	..	..	..	..	32,590	26,571
	(<i>Foreign markets</i>)						

(*Syndicat Général de l'Industrie Cotonnière Française.*)

GERMANY.**SPINNING SECTION.**

The position in the German spinning section during the first quarter of 1937 was the same as in the previous quarter. The demand for yarns and running contracts remained as active as heretofore; in accordance therewith the degree of occupation of the mills during the period under review remained the same.

The following is the original report in German:—

Die geschäftliche Lage der deutschen Baumwollspinnereien bot auch im 1. Quartal 1937 das gleiche Bild wie im voraufgegangenen Quartal. Die Nachfrage nach Gespinsten und der Abruf auf laufende Abschlüsse blieb weiterhin lebhaft. Demgemäss konnte auch der Beschäftigungsgrad der Betriebe durchweg auf dem gleichen Stande gehalten werden.

(Fachgruppe Baumwollspinnerei.)

WEAVING SECTION.

The receipt of orders slackened somewhat until the middle of February, but since then demand has increased somewhat, so that for the first quarter of 1937, as compared with the same period of 1936, conditions have hardly changed.

The demand for early deliveries shows an increase, and in connection therewith the degree of activity has risen somewhat.

The following is the original report in German:—

BAUMWOLLWEBEREI.

Der Neueingang von Aufträgen hatte bis Mitte Februar nachgelassen, war aber seither lebhafter, sodass er für das ganze erste Vierteljahr 1937 gegenüber dem letzten Vierteljahr 1936 sich kaum geändert hat.

Der Abruf auf frühere Gewebe-Abschlüsse wies eine weitere Steigerung auf. Im Zusammenhang damit ist auch der Beschäftigungsgrad noch etwas gestiegen.

(Süddeutsche Bezirksgruppe der Fachuntergruppe Rohweberei der Fachgruppe Baumwollweberei.)

HOLLAND.**SPINNING SECTION.**

Conditions in the spinning section of the trade have improved rather a lot during the last few months. The demand for yarns is much larger than last year, and although imports of cotton yarns both from Lancashire and also from Belgium have increased, most spinning mills are fully engaged, and many of them have sold their full production for some months ahead. Spinning margins are also better, more so for coarse counts than for medium and finer counts on account of the high prices at present wanted for staple cotton.

MANUFACTURING SECTION.

In the weaving section of the trade conditions are also much better than some months ago. The demand from the Dutch East Indies has improved very much on account of the higher buying power of the native and for all cotton goods for which quotas exist, the quantities of these quotas had to be increased rather considerably. The result is, that most weaving mills are fully employed, which fact had a favourable effect on the internal competition. Margins have improved, and although some manufacturers complain that the prices of cotton goods have not always followed the rather considerable increase in yarn prices, conditions on the whole are more satisfactory than has been the case for some years.

Most spinning and weaving mills are fully engaged, and the number of persons employed in the cotton industry has increased from 27,088 in January, 1936, to 27,348 in September, 1936, and to 34,197 in March, 1937. There have been few changes in wages and most mills work 48 hours per week. In those cases where double shifts are employed, a premium of from 5 to 10 per cent. is paid above the ordinary wages.

HUNGARY.

Trade conditions in the cotton industry have not shown much alteration in Hungary lately. In the cotton spinning and weaving sections the degree of occupation, working time and wages have remained unchanged.

Important data from trade figures for the year 1936 are as shown in the original German report printed below:—

The original report in German runs as follows:—

Die Lage der Baumwollbranche hat in der letzten Zeit in Ungarn keine wesentliche Aenderung erfahren. Sowohl in der Baumwollspinnerei, als in den Webereien sind Beschäftigungsgrad, Arbeitszeit und Arbeitslöhne unverändert geblieben.

Die wichtigsten Daten des Aussenhandels für das Jahr 1936 sind:—

	Imports <i>Einfuhr</i> quintals	Exports <i>Ansfuhr</i> quintals
Raw cotton (<i>Rohbaumwolle</i>)	287,832	2,961
Cotton yarn (<i>Baumwollgarne</i>)	16,463	1,247
Cotton piece goods (<i>Baumwollgewebe</i>) ..	7,353	17,196

(Magyar Textilgyárosok Országos Egyesülete.)

INDIA.

Sales of cotton piece goods by most of the domestic mills were reported to have been more satisfactory during 1936 than in 1935, and in the early part of the current year the movement in Indian-made cloth showed a steady and good improvement at higher prices. Dealers' stocks were low and manufacturers were demanding and also receiving higher prices for replacements. Imports of

British cotton piece goods declined in 1936, and in early 1937 both sales and forward business in Lancashire piece goods were being restricted by comparatively high current prices and uncertainty as to future levels. Trade in Japanese goods continued active in 1936 with prices generally steady, but during the first part of the current year the movement of Japanese goods, as well as forward business, was slow pending the outcome of the Indo-Japanese textile agreement negotiations.

Labour conditions in the cotton mills during 1936 were comparatively satisfactory, and a feature of the year was the almost complete absence of prolonged labour stoppages. In Bombay, better relations between employers and operatives were established through the co-operation of Government officials with the Bombay Millowners' Association. In the Ahmedabad mills, a dispute relative to a contemplated cut in wages developed in the latter part of the year, and was settled at the end of February, 1937, although mills were still working as a result of the intervention of arbitrators.

On the basis of returns for the first eight months of 1936, mill production of cotton yarn is estimated to have increased approximately 2.5 per cent. and cloth production to have declined slightly in 1936 as compared with 1935. Prices on the whole were lower than in 1935, but fairly satisfactory. Large accumulated stocks of piece goods had a depressing effect on the cloth market. Stocks reached their peak in July and during the remainder of the year stocks of yarn and cloth declined. Mills were disposing of their products on a larger scale and at more remunerative prices. While specific data are not available, it is reported that some mills made satisfactory profits during 1936 and that the financial position of the majority improved.

Little if any progress was made in the installation of automatic machinery during 1936. Analysis of available cotton-spinning data appears to indicate that Indian mills are reverting to coarser counts, a trend partially confirmed by the smaller imports of foreign cotton, notably American. However, some Indian mills now are producing larger quantities of cotton and rayon mixtures and finer qualities of goods.

(United States Department of Commerce.)

POLAND.

DEGREE OF OCCUPATION OF COTTON MILLS

	Per cent.	
Dec. 21-27, 1936	71.96	of full time production (48 hours)
Dec. 28, 1936, to Jan. 24th, 1937 ..	84.81	" " "
Jan. 25, 1936, to Feb. 21, 1937 ..	104.93	" " "

EXPORTS

	Cotton Yarn		Piece Goods		Clothing
	value	weight	value	weight	weight
	zl.	kg.	zl.	kg.	[kg.
January, 1937 ..	—	—	355,971	57,961	190,682
February, 1937 ..	—	—	297,360	56,822	434,803

(Zrzeszenie Producentów Przedzdy Bawelnianej w Polsce.)

SWEDEN.

General conditions in the Swedish cotton industry remain fairly favourable. The competition from Japan has turned a little easier, due to a slight stiffening of the prices on Japanese import-goods. Most of the cotton industry is running full time.

The agreement between the employers' and the workers' organizations of 1931 was called off by the workers last September. The negotiations came to a deadlock, and, with possible strike in view, some forced buying took place, which might react unfavourable in the near future.

The wages dispute was settled by a new agreement, January 25. The earnings of all time-rate workers were increased by 6 per cent. on the average. No changes took place in regard to the piece rates. The new agreement is valid until end of December, 1938.

U.S.A.

The monthly report of the Census Bureau shows that the consumption of lint cotton by domestic mills in March amounted to 779,000 bales, against 644,000 bales in February and 549,000 bales in March, 1936, making a total of 5,291,000 bales so far this season, against 4,073,000 bales a year ago. Exports for the month are returned at 468,000 bales, excluding linters, against 463,000 bales in February and 405,000 bales in March last year, bringing the season's total so far to 4,366,000 bales, against 4,814,000 bales last season. Stocks in the hands of manufacturers amount to 2,080,000 bales, against 2,056,000 bales last month and 1,334,000 bales in the corresponding month last year, and in outside warehouses to 5,037,000 bales, against 5,066,000 bales and 6,570,000 bales. Spindles active during March totalled 24,630,000, against 24,536,000 in February and 23,176,000 in March last year. Linters' consumption in March was 74,000 bales, against 61,000 bales last year. Stocks at mills amount to 208,000 bales, and in outside warehouses to 72,000 bales, against 258,000 bales and 65,000 bales respectively a year ago.

(Reports from the Czecho-Slovakian and Swiss Associations will be found under Miscellaneous. These arrived too late for insertion into this section.)



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1936-37.

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ARGENTINA.

According to a telegram of March 7 from the Junta Nacional del Algodón, the first estimate of ginned cotton production in 1936-37 shows a decrease of 3.7 per cent. on that of last season despite an increase of 33 per cent. in area sown. The reduction this season is attributable exclusively to the very unfavourable weather and especially to the prolonged drought, which caused very appreciable damage to cotton on the Chaco and in the north of Santa Fé and of Córdoba. In Santiago del Estero there were also complaints of locust damage. Despite this, however, production of lint is about 89 per cent. above the average of the five preceding years, owing to the expansion of the area. In the following table are the data of area cultivated in the present and in the preceding five seasons, according to province.

Years	ACRES					Total
	Chaco	Corrientes	Santiago del Estero	Formosa	Santa Fé and other provinces	
1936-37* ..	720,000	120,000	70,000	54,000	46,700	1,010,700
1935-36 ..	606,220	59,472	55,036	30,246	12,182	763,156
1934-35 ..	571,111	61,629	61,777	11,985	593	707,905
1933-34 ..	438,569	21,300	13,600	8,400	50	481,919
1932-33 ..	329,000	8,600	2,700	2,200	—	342,509
1931-32 ..	323,102	2,217	1,745	2,397	—	336,461

* First estimate.

The table shows that there has been a more marked increase every year since 1932-3, not only on the Chaco, till then the typical cotton area, but in the other provinces, thanks especially to the very intense propaganda carried on by the Junta Nacional del Algodón.

(International Institute of Agriculture.)

BRAZIL.

The figures which follow show the production and classification of cotton in the State of São Paulo during the first ten months of the current crop, March, 1936, to January, 1937, as compared with the corresponding period of the previous year.

It will be observed that considerable improvement has taken place, not only in the quantity grown, but also in the grades classified:

The State Government is now centralizing the distribution of seeds with a view to uniformity of types produced.

Types	Bales		Kgs.		Percentages	
	1935-36	1936-37	1935-36	1936-37	1935-36	1936-37
1 ..	258	—	41,277	—	0.04	—
2 ..	4,439	3,389	727,553	566,397	0.74	0.32
3 ..	26,960	90,749	4,545,311	15,638,348	4.63	8.85
4 ..	71,642	299,045	12,051,861	51,846,177	12.29	29.37
5 ..	174,728	360,875	29,491,551	62,525,154	30.06	35.41
6 ..	161,468	181,901	27,107,482	31,405,341	27.64	17.79
7 ..	87,639	60,801	14,972,374	10,422,375	15.26	5.91
8 ..	38,675	18,056	6,487,113	3,077,208	6.61	1.74
9 ..	12,709	4,710	2,107,337	796,955	2.15	0.45
Inf. to 9 ..	3,461	1,635	564,428	271,755	0.58	0.16
	<u>583,979</u>	<u>1,021,161</u>	<u>98,096,287</u>	<u>176,549,710</u>	<u>100.00</u>	<u>100.00</u>

The export of raw cotton is still subject to the exchange quota of 35 per cent.

The Bolsa de Mercadorias (Produce Exchange) of São Paulo, in order to complete its collection of samples and types, national and foreign, for use in the classification school, and for general information of those interested, has authorized the purchase of bales of American, Egyptian and Indian cottons, and collections of type samples, inclusive of those known as "universal types."

(*Brazilian Consul, Liverpool.*)

The Brazilian Ministry of Agriculture, first estimate of the 1936-37 South Brazilian cotton crop as of March 31, 1937, is for a harvest of 923,000 bales (equivalent 478 lbs. net) as against a harvested crop of 899,366 bales in 1935-36 and 576,517 bales in 1934-35.

BRAZILIAN COTTON PRODUCTION.

	*North (478lbs. bales)	*South (478lbs. bales)	Of which Sao Paulo (500lbs. bales)	Total (478lbs.)
1930-31	402,146	81,201	17,345	483,347
1931-32	428,882	126,377	46,295	555,249
1932-33	258,648	191,274	93,718	449,922
1933-34	483,278	530,377	153,204	1,013,655
1934-35	728,255	576,517	451,023	1,358,772
1935-36	819,023	899,366	432,995	1,718,389
1936-37	690,000	1,100,000	779,555	1,790,000

*United States Department of Agriculture.

GREECE.

The final figures for the current Greek cotton crop, as reported by the Greek Cotton Institute, give a total of about 40,000,000 okes (one oke = 2.832 lbs.), which, however, is very much below the original estimate of about 52,000,000 okes. Unfavourable weather conditions are given as a reason for the unsatisfactory results. About 31,000,000 okes have found their way to the textile industry; the balance is still held by the producers. Action taken by the Agricultural Bank at the beginning of December last to arrest a

decline in prices has resulted in a rise from 12 to 15 dr. per oke (depending on grade) to 16 to 21 dr. per oke.

(*Textile Weekly.*)

PARAGUAY.

Cotton exports in 1935 amounted to 7,951 metric tons, which is slightly lower than the exports in 1934 (8,070 tons), according to official figures. Of these quantities, 6,112 and 4,567 tons, respectively, were shipped to Argentina. These represent transit shipments, Paraguayan cotton being exported through Argentine firms. Direct shipments to France amounted to 1,529 tons in 1935 and 1,389 in 1934. Smaller quantities were reported shipped to Germany, Belgium, Great Britain and Uruguay. It is estimated that the exports for 1936 will approximate 10,000 tons.

The 1936-37 crop (which is to be picked during the first half of 1937) is reported to have been planted in a much larger acreage and is expected to be considerably greater than the preceding crop. It is reported that the Government has concentrated its efforts on increased cotton production as a source of securing foreign exchange and growers in many districts are said to have planted cotton in place of other crops.

(*Textile Raw Materials.*)

PERU.

Prosperous conditions again characterized the cotton industry in 1936 (as in the three preceding years), owing to the combination of high yields, ready demand and favourable prices, according to local press reports. Although the planted acreage in 1936 is believed to have exceeded all records the crop, estimated at about 350,000 bales of 500 lbs., fell about 20,000 bales under the high mark established in 1935.

Exports for the calendar year 1936 were the highest on record, 79,000 metric tons. However, they were only slightly larger than in 1935, when shipments amounted to 78,000 tons, but substantially higher than 1934 shipments of 68,000 tons. Shipments to Great Britain were slightly greater and exports to Japan considerably larger than in 1935, while shipments to Germany showed a small decline. Details by principal countries are given in the following table:—

Destination	Metric Tons		
	1936	1935	1934
Great Britain	34,253	31,382	49,910
Germany	23,231	25,000	
Japan	12,103		
Belgium	2,660		
Netherlands	1,376		
France	1,906		
Chile	1,560		
India	820		
Italy	781		
Other countries	422		
Total	<u>79,122</u>		

cent.
2,340
of

Demand for higher grades was good throughout the year, but shippers in some cases found themselves in a rather short position owing to the more limited volume of the higher qualities as the season progressed.

Domestic consumption of cotton in 1936 is placed at around 30,000 bales (of 500 lbs.), compared with 27,000 in 1935. Higher tariff protection and new equipment in many of the mills which worked full time throughout the year accounts for the steady advance in local consumption. Production of finer goods is increasing.

(United States Department of Commerce.)

QUEENSLAND.

Although increased acreage had been planted in the cotton lands for the season just ended, the cotton crop for 1936 was disappointing. Altogether, owing to the long, hot, dry weather conditions which prevailed during the most critical growth periods of the cotton plant, and though the planting season was excellent, the continued dry conditions were responsible for a greatly decreased yield, which fell from 14,415 bales to 13,504 bales.

This decreased yield is particularly unfortunate, as the cotton textile industry in Australia has during the past year made marked development, and the consumption of raw cotton in Australia for 1936 constituted a record for this country. Cotton spinning and cotton textile manufacturing are comparatively new industries, and the consumption of raw cotton last year in our mills was approximately 21,000 bales. This means that Australian spinners of cotton had to import about 8,000 bales of the raw material for her mills' requirements.

Queensland will, and must, increase its production of cotton, but her erratic weather conditions constitute a problem, the solution of which lies in the construction of irrigation facilities wherever possible. The average increase of the cotton yield would be three times the yield of the production under natural rainfall conditions. The Fitzroy and Dawson rivers, with their tributaries in the central district (cotton-growing district), the Burnett in the upper and lower Burnett districts, and the Brisbane River, with its numerous tributaries in West Moreton, and the Lockyer, offer every advantage for irrigation systems.

(Textile Journal of Australia.)

ST. VINCENT.

Owing to the relatively dry weather of August and September planting continued well into October and considerable supplying of seed was necessary. The early growth of the crop was poor, but the weather improved in October and November and much better progress was made. Bolls matured on some of the first-planted fields early in December, when the weather was again relatively dry. Later in December the weather changed, and it was feared that much of the maturing cotton would be stained. In December it was estimated that the yield of Sea Island would be about 4,400 centals (920 bales of 478 lbs.) against 3,970 (830) in 1935-36 and 2,340 (490) on the average 1930-31 to 1934-35 (percentages: 110.8

and 187.9); but towards the end of January it was reported that if the wet weather continued a serious reduction would probably be proved.

Early in the season the incidence of cotton aphid was fairly high, and later there were indications that pink boll-worm would be more prevalent than in recent years. The slight attack of the cotton caterpillar on the Leeward coast proved abortive.

(International Institute of Agriculture.)

SUDAN.

The Cotton Progress Report for February published by the Director of Agriculture and Forests confirms previous unofficial estimates of a crop well above the average in the Gezira where, it is now estimated, the crop will yield over four cantars of 315 rotls seed cotton per feddan compared with a yield of about 3.8 rer feddan in the previous season. The 167,288 feddans of the Sudan Plantations Syndicate under Sakel cultivation and the 31,827 feddans of the Kassala Cotton Company are expected to yield 800,000 cantars, of which 300,500 cantars have already been picked in the former area and 74,000 in the latter. This, combined with 80,000 cantars from the Tokar district, 60,000 cantars from the Kassala district, 2,000 cantars from the Ed Dueim pumping scheme, 2,000 cantars from Gondal and 41,000 cantars from private estates brings the estimated Sakel crop to 985,000 cantars.

AMERICAN (*Irrigated*).

The anticipated yield of American cotton is 45,763 cantars, of which 11,321 and 9,000 cantars from the Berber and Dongola pump schemes, respectively, 21,285 cantars from Zeidab and 4,157 from other estates.

AMERICAN (*Raingrown*).

The total area under cultivation is 161,300 feddans as against 123,036 feddans in the previous season, and the final yield is expected to reach 120,000 cantars compared with 118,800 cantars in the season 1935-36.

The estimate for the total crop is 1,150,800 cantars, compared with the previous season's yield of 970,200 cantars.

("Sudan Daily Herald.")

TURKEY.

The cotton crop of 1936 was greatly reduced by unfavourable climatic conditions during September and October, according to reports of local authorities. It is said that in the Adana district the probable crop is about 110,000 bales of about 440 lbs. While it had been expected to yield 260,000, the total crop in all districts is now estimated at about 170,000 bales.

Prices of Turkish cotton are said to be from 40 to 50 per cent. higher than world prices, the better grades being sold at about 18½ cents. (United States currency) per pound.

(Textile Raw Materials.)

UGANDA.

H.M. Eastern African Dependencies' Trade and Information Office has received the following report from Uganda, for the month of January, 1937 :—

In most areas the dry period which occurred in the beginning of December was followed by rainfall above average. Late-sown cotton in the Eastern and Northern Provinces benefited and in Buganda crop prospects improved considerably. A certain amount of damage was caused to ripe bolls. Grade was adversely affected in some areas, but generally is satisfactory. On the whole, crop prospects improved slightly during December. Conditions during January were normal and prospects continued to be satisfactory.

UNION OF SOUTH AFRICA.

Good and general planting rains were experienced and prospects at the beginning of March were favourable.

Owing to the advance in price and steadiness of the cotton market, a larger acreage has been planted throughout all areas.

The 1935-36 season was the latest recorded in the last twelve years. Following approximately ten months which were virtually rainless, planting rains did not materialize until mid-January. Succeeding conditions for growth were good, but pest infestation in many areas was somewhat severe.

Cotton planting is normally expected to be completed by mid-December; "dry" planting, carried out before the rains, resulted in poor standards and low yields.

The yields from irrigated areas were satisfactory. An invasion of jassid in the Orange River area fortunately appeared too late to cause any material damage.

(International Institute of Agriculture.)

U.S.S.R.

The success in cotton cultivation, which has made the U.S.S.R. fully independent of other countries in the supply of cotton, represents one of the greatest achievements of Soviet national economy.

By December 20, 1936, the raw cotton harvest in the U.S.S.R. amounted to 2,205,000 tons, which is equivalent to over 745,000 tons of cotton fibre, as against 532,000 tons of fibre in 1935.

The Five-Year Plan for the development of cotton growing, which provided for a yield of 70,000 tons of cotton fibre only in 1937, was thus overfulfilled in four years.

The powerful development of Soviet cotton cultivation is an achievement of recent years. In 1928 the gross output of cotton fibre constituted only 243,000 tons.

In 1936 the Soviet Union assumed the world's third place in cotton harvest after the United States and India.

The area under cotton in the U.S.S.R. now reaches two million

hectares (hectare = 2.5 acres). Cotton cultivation has spread far beyond the borders of Central Asia and Transcaucasia; the aggregate area sown with cotton in the Ukraine, Northern, Caucasus, Azov-Black Sea area and Crimea now exceeds 400,000 hectares.

State and collective farmers have become the principal cotton growers. At the beginning of the second Five-Year Plan their share in the output of cotton constituted 84.2 per cent., and in 1936 it had already reached 98 per cent. The former primitive methods of cotton growing have been replaced by the highly-productive technique of large-scale socialized agriculture. The number of tractors in the irrigated cotton areas has increased fourfold in the past four years from 7,224 in 1932 to over 30,000 in 1936. In the past year the chemical industry of the U.S.S.R. supplied the cotton-growing areas with 280,000 tons of nitrogenous and 580,000 tons of phosphate fertilizers.

The extensive development of the irrigation system, the application of machines and fertilizers, and particularly the development of the Stakhanov movement have contributed to the success in cotton-growing. In many collective and State farms, where the Stakhanov movement is strong, the yield of raw cotton reached 6, 8, 10 and more tons* per hectare in 1936. The average labour efficiency of cotton growers on collective farms has almost trebled during the past 5-6 years.

(The Monthly Review of the U.S.S.R. Trade Delegation in Great Britain.)

Cotton Production Costs in Argentina.

A cotton production cost schedule has recently been compiled by the Argentine Ministry of Agriculture. This is the first work of its kind to be carried out in connection with the growing of cotton in the Argentine Republic.

Apart from its present statistical value, the report will act as a basis for similar works carried out during the coming years, which will then cover the whole of the cotton-growing area.

It is of interest to observe that the entire compilation of the necessary data has been effected by personnel belonging to the National Cotton Junta, in co-operation with field officers of the Department of Agriculture numbering over five hundred, and spread throughout the whole of the cotton zone.

The report comprises an introduction, seven chapters and an appendix. The first four chapters contain a general study of production costs and the various systems adopted for their determination, with special reference to the method followed for the purposes of the present report.

Chapter V enters fully into the study and determination of the

* Presumably lint and seed together.—(Ed., I.C.B.)

cost of cotton production per hectare and per ton, in the various zones of El Chaco, in accordance with the figures given below:—

COST PER HECTARE—(In Argentine dollars)							
	Zone I	Zone II	Zone III	Zone IV	Zone V	Zone VI	Average
Labour:							
Maintenance and monthly wages ..	40.00	40.00	35.00	35.00	30.78	40.00	37.46
Day labourers during picking season ..	57.50	65.00	43.32	37.90	36.82	48.75	51.57
Day labourers for other purposes ..	27.00	27.00	14.30	14.30	14.30	19.00	21.80
Materials:							
Seed ..	1.80	1.80	1.44	1.80	1.44	1.62	1.66
Insecticides ..	11.40	16.00	11.40	12.00	11.40	11.40	12.34
Sacks and twine ..	7.10	8.21	4.94	4.32	4.20	5.55	6.23
Locked-up capital:							
Preservation ..	14.18	10.79	10.37	8.03	8.21	13.89	11.68
Redemption ..	8.81	6.30	7.13	5.67	5.39	8.86	7.54
Interest ..	10.47	8.22	7.89	6.38	5.88	10.19	8.65
Total ..	178.26	183.32	135.79	125.40	118.42	159.26	158.93
Transport ..	4.99	4.74	3.38	1.20	2.55	2.84	3.83
Total ..	183.25	188.06	139.17	126.60	120.97	162.10	162.76
Ground rent ..	1.85	7.20	—	—	—	1.99	2.40
Total cost per hectare	185.10	195.26	139.17	126.60	120.97	164.09	165.16

COST PER TON							
	Zone I	Zone II	Zone III	Zone IV	Zone V	Zone VI	Average
Total ..	155.01	141.01	169.74	179.14	174.15	176.95	158.62
Transport ..	4.34	3.65	4.22	1.71	3.75	3.16	3.82
Total ..	159.35	144.66	173.96	180.85	177.90	180.11	162.44
Ground rent ..	1.61	5.54	—	—	—	2.21	2.40
Total cost per ton ..	160.96	150.20	173.96	180.85	177.90	182.32	164.84

The area planted with cotton, the yield and the production of each individual zone, are as follows:—

Zones	Area (Hectares)	Yield (Kgs. per hectare)	Production (1,000's tons)
I ..	80,891	1,150	93
II ..	50,118	1,300	65
III ..	11,459	800	9
IV ..	7,905	700	6
V ..	56,060	680	38
VI ..	39,192	900	35
Total for the Chaco ..	245,625	1,002	246

The zones are constituted as follows:—

- Zone I.—Pte. Plaza, Machagai, Quitilipi, Pcia. R. Saenz Peña, La Garzita, La Verde.
 Zone II.—Resistencia, Barranqueras, Margarita Belen, Colonia Benitez, Laguna Blanca, Magallé, Lapachito, Las Palmas, Pto. Bermejo, Zapallar, Pte. Roca.
 Zone III.—Castelli, Tres Isletas, La Florida, El Aguará.
 Zone IV.—Avia Terai, Concepción del Bermejo, Pampa Inferno.
 Zone V.—Campo Largo, Corzuela, Charata, Colonia Gral. Necochea, Gral. Pinedo, Gral. Capdevila, Gancedo, Las Breñas.
 Zone VI.—E. Urien, Haumonia, La Cuchilla, Samuhí, Villa Berthet, Villa Angela.

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NEW COTTON REGULATIONS IN BRAZIL.

According to a report published in a recent issue of *Foreign Agriculture*, the Legislature of the state of Rio Grande do Norte in North-eastern Brazil adopted a law on December 9, 1936, providing that establishments for the ginning, baling, and exporting of cotton may function in the state only upon fulfilling certain conditions. They must produce cotton on an area of land equal to one hectare (2.471 acres) for each saw of each gin they operate; on an area equal to 100 hectares for each baling press of small capacity, and on an area equal to 300 hectares for each baling press of large capacity.

It also provides that each cotton processing establishment must maintain a primary school for operatives or tenants and their children in every locality where ginning machinery with more than 120 saws is installed. Moreover, they must give free medical assistance to operatives for injury or sickness contracted as a result of employment in the plants.

Owners of cotton processing and handling establishments must build separate cotton warehouses for individual types and kinds of cotton handled and must distribute free to farmers through the medium of the Cotton Textile Service one ton of selected seed, or its equivalent in cash, whenever a gin has between 80 and 120 saws; three tons when it has between 120 and 140 saws; and five tons when it has more than 140 saws. The law also provides for the prosecution of establishments which in any manner contribute to the devaluation of cotton either through mixing types or by using ginning machinery which damages the quality of the fibre. Exportation of cotton-seed and cotton-seed cake and meal is permissible only when not prejudicial to the livestock industry of the state.

It is also illegal for any one company, except a producer co-operative institution, to own or control more than 15 per cent. of the number of saws and rollers of cotton-ginning machines, or more than 15 per cent. of the number of presses for baling cotton. Foreigners may own or manage only up to 40 per cent. of the total number of saws and export presses existing in the state. An official cotton classification certificate is to be made obligatory for liquidating purchase and sale transactions.

Finally the law provides for collecting export taxes on cotton in advance of the shipments and for increasing such taxes by 20 per cent. Unless the cotton has been exported by September 30 of each year an additional tax may be imposed when actually exported.

There are indications that the Legislatures of other states of North-eastern Brazil may adopt similar legislation during the current year.

INCREASE IN COTTON PRODUCTION IN TURKEY.

In lending its support to the popularising of cotton fabrics throughout the country, the first thought of the Government has been to encourage the growth of good quality cotton, in sufficient quantity to meet the needs of the domestic cotton industry.

The President of the Council himself had fixed a total of 500,000 bales as the first objective to be attained by the Ministry of Agriculture.

There is no doubt that the planter will achieve this result in about five years' time. This intensified production is meant to supply not only the needs of the domestic industry, but also a considerable percentage of the export trade as well.

This year's crop is estimated at 200,000 bales against 150,000 to 160,000 in previous years. The cotton-growing regions of Cukurova, Egé, Balikesir, Sakarga, Adana and, to some extent, Kars, which produces the finest quality cotton in Turkey, will each add its quota to the total crop, and the Government is making fresh attempts at cotton-growing in other districts, notably in Canakkale, Gelibolu and Diarbekir. Preliminary attempts in this latter region have shown very satisfactory results. The experiments are made under the direct control of the Vilayet Department of Agriculture, and it is hoped to improve the technical conditions of cultivation and to make more use of sectionalized seed.

This year, seed of five qualities of American type cotton, bred in the selection stations of Adana and Nazilli, has been planted in the Germik area; this district is particularly suitable for the growth of this type of cotton. The "Cleveland" variety of seed, however, is the one which yields the best results.

The Vilayet Department of Agriculture has instituted an enquiry in the shape of a questionnaire addressed to every village. It is hoped that this will enable the authorities to determine the quantity of native cotton seed of inferior quality possessed by the farmers which should be replaced by selected seed brought from Adana and distributed gratis to the farmers.

SINO-JAPANESE COTTON UNDERSTANDING.

It is reported that an understanding between the Chinese and Japanese cotton industrialists has been reached during the visit of the recent Japanese economic mission to China, whereby the Japanese will co-operate in improving and increasing the cotton production in China under a five-year plan, which will yield a surplus of 10,000,000 piculs for export to Japan after satisfying the home demand. It is also reported that China hopes eventually to export enough cotton to Japan to supply one-half of Japan's present imports of raw cotton from America and India, which at present amount to an annual value of 900,000,000 yen.

WORLD TRADE IN COTTON.

1,000 Centals (1 Cental = 100 lbs.).						
Countries :	Six months (Aug. 1—Jan. 31)				Twelve months (Aug. 1—July 31)	
	Exports		Imports		Exports	Imports
Exporting Countries	1936-37	1935-36	1936-37	1935-36	1935-36	1935-36
United States ..	17,999	21,083	357	280	31,337	791
Argentina ..	520	456	—	—	1,030	—
Brazil ..	1,744†	968†	—	—	3,549	—
India ..	7,035	4,791	582	589	14,919	1,279
Egypt ..	3,885*	4,248*	—	—	8,095	—
Importing Countries:						
Germany ..	2	485	2,915	4,332	753	7,264
Austria ..	—*	—*	366*	381*	—	886
Belgo-Luxemb.E.U.	335	320	1,281	1,235	653	2,377
Denmark ..	—	—	99	101	—	176
Spain ..	—	—	—	—	—	—
Estonia ..	—	—	64	57	—	119
Finland ..	—	—	174	176	—	280
France ..	205	185	3,699	3,391	335	7,143
Greece ..	—	11	31	53	11	110
Hungary ..	—	—	284	282	—	560
Italy ..	—	—	—	—	—	—
Latvia ..	—	—	64	53	—	97
Norway ..	—	—	37	33	—	71
Netherlands ..	11	2	606	525	4	1,001
Poland-Dantzic ..	—	2	787	811	4	1,614
Portugal ..	—	—	196*	231*	—	560
United Kingdom..	298	362	8,444	7,871	747	15,168
Sweden ..	—	—	359	351	—	672
Switzerland ..	—	—	384	320	—	549
Czecho-Slovakia ..	29	26	1,182	1,151	49	2,130
Yugoslavia ..	—	—	205	196	—	375
Canada ..	—	—	904	798	—	1,358
China ..	463*	542*	207*	225*	892	915
Japan ..	326*	201*	7,421*	5,388	582	18,089
Algeria ..	—†	—†	2†	2†	—	4
Totals..	32,852	33,682	30,650	28,832	62,780	63,588

(International Institute of Agriculture.)

* Data up to December 31st.

† Data up to November 30th.

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†WORLD'S COTTON CROPS.

				(Bales of 500 lbs. —000's.)			
				1933-34	1934-35	1935-36	1936-37
U.S.A. Lint	13,047	9,637	10,638	12,407
Linters	..	..	..	982	1,001	1,100	1,100
Total	..	..	..	14,029	10,638	11,738	13,507
Mexico	..	..	..	255	223	235	348
Brazil	..	..	..	958	1,309	1,743	1,470
Peru	..	..	..	278	336	342	345
Argentine	..	..	..	196	295	354	400
Other South American	..	..	..	76	70	90	90
India*	..	..	..	5,108	4,858	5,728	5,700
China	..	..	..	2,652	3,001	2,322	3,650
Japan, Korea, etc.	..	..	..	197	224	230	275
East Indies, etc.	..	..	..	15	16	16	16
Russia	..	..	..	1,917	1,744	2,430	3,040
Persia	..	..	..	137	200	120	120
Iraq, Ceylon, etc.	..	..	..	†	2	4	4
Asia Minor and Europe	..	..	..	203	263	384	404
Egypt	..	..	..	1,715	1,511	1,707	1,889
Sudan	..	..	..	126	237	193	190
East Africa (British)	..	..	..	274	273	328	328
South Africa (British)	..	..	..	3	3	4	4
West Africa (British)	..	..	..	23	47	40	40
Non-British Africa	..	..	..	154	165	165	165
West Indies (British)	..	..	..	3	4	4	4
West Indies (Others)	..	..	..	23	33	23	23
Australia, etc.	..	..	..	18	14	16	16
World's Total	..	..	..	28,360	25,466	28,216	32,028
Outside Growths	..	..	..	14,331	14,828	16,478	18,521
Per cent. on Total	..	..	..	50.5	58.2	58.5	57.8

*Government estimate, 400 lb. bales.

†Less than 500 bales.

‡Figures reproduced with acknowledgment to *Empire Cotton Growing Review* (John A. Todd's Cotton Statistics).

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Final Ginning Report.

The final ginning report issued on March 20 by the U.S. Census Bureau shows that the total amount ginned of last year's American cotton crop was 12,130,000 running bales, against 10,420,000 bales for the previous season and 9,472,000 bales two seasons ago.

The amount ginned since the last report is 173,000 bales, against 167,000 bales in the same period last year. The cotton included in the total but not yet ginned is estimated at 27,000 bales, against 18,000 bales unginned after the March census last year. The total includes 282,000 round bales and 18,000 bales American-Egyptian, against 294,000 and 18,000 respectively last year. The average gross weight of bales is estimated at 510.6 lbs., against 510.5 lbs. last year and total ginnings in equivalent 500-lb. bales are 12,387,000 bales as compared with 10,638,000 bales for the previous crop.

The following table gives details with comparisons:—

	1937	1936	1935
Alabama	1,135,000	1,033,457	936,080
Arizona	188,000	131,541	113,184
Arkansas	1,265,000	841,518	848,997
California	437,000	232,725	251,523
Florida	28,000	26,653	24,343
Georgia	1,086,000	1,052,662	974,868
Louisiana	743,000	541,360	473,333
Mississippi	1,863,000	1,226,295	1,121,332
Missouri	302,000	182,823	230,368
New Mexico	105,000	70,178	83,689
North Carolina	598,000	549,313	640,924
Oklahoma	290,000	562,704	329,845
South Carolina	800,000	738,744	684,619
Tennessee	422,000	315,602	396,655
Texas	2,826,000	2,849,750	2,314,894
Virginia	30,000	27,619	32,997
Other States	12,000	7,402	14,371
Total	<u>12,130,000</u>	<u>10,420,346</u>	<u>9,472,022</u>

GOVERNMENT CLASSING SERVICE.

The recent announcement by the U.S. Department of Agriculture relative to establishing a cotton classing service is of particular interest. At present cotton buyers in the rural market sections pay practically no premium for staple length in upland cotton which has caused many farmers to plant the short-linted varieties like Half and Half. By classing all cotton and selling same on merit, farmers would soon discard the one-half inch lint types for varieties with longer staples. The Bureau explains that it is not known to what extent provisions for buying cotton on the basis of classified samples could be made in the various local markets, since conditions vary in the different markets. And these differences, it is stated, should be considered in attempting to establish and maintain a cotton classification service.

Assuming that the various requirements could be met, the Bureau believes that a cotton classification service to growers would increase the bargaining power of farmers who produce higher qualities of cotton, encourage quality improvement, increase the usefulness of price quotations for grade and staple length, make possible a reduction in the waste from resampling cotton, improve warehouse receipts as collateral for loans, and make possible other economies in marketing cotton."

ENVIRONMENT MAY CHANGE AMERICAN COTTON CHARACTERISTICS.

Experiments have recently been undertaken by the United States Department of Agriculture to find out what characteristics of cotton varieties are kept relatively stable under widely different environments.

At least 64 different characteristics of the cotton plant and fibre are being studied during the three-year test. These fall under the general classifications of growing conditions, gin data, fibre properties, and spinning utility.

The first year of study indicates that characteristics such as staple length, lint per cent., weight of lint per 100 seed, and lint fineness do not change greatly as environment changes. But characteristics such as yield, time required for germination and to reach blooming stage, time of opening, and maturity of fibre are modified to a considerable extent by seasonal conditions present at the various locations.

Surprising variations occurred at the end of the first year, particularly in comparing four-lock and five-lock bolls at the various stations. This has been considered a characteristic of variety rather than environment and significant varietal differences were found at all locations. Nevertheless it was found that environmental conditions at various locations greatly modified the proportion of four and five-lock bolls on all varieties. For instance, the average percentage of four-lock bolls for all varieties

varied from less than 51 to more than 78 per cent. at the different locations.

Variety bowed to environment again in time of germination, time of blooming and time of opening. At the Statesville, N.C., station, in the Piedmont area, all 16 varieties were slower in germinating than at any of the other 13 stations, but in 50 to 55 days reached the bloom stage—the shortest period for any of the stations. Greenville, Texas, for instance, took 85 days to reach the bloom stage.

Despite its record for earliest bloom stage, the North Carolina station dropped to last place in time of opening, an average of 137 days from planting time. Cotton at Prattville, Ala., set the pace in opening, averaging 105 days for all 16 varieties. Greenville, Texas, cotton took 85 days to bloom but only 123 days to open.

Factors Affecting U.S. Cotton Exports.

THE following is extracted from a paper on the above subject, which was presented before the Houston Foreign Trade Association in February last by Mr. Lamar Fleming, junr., of the firm of Anderson, Clayton & Co.

"In examining the probabilities affecting the future trend of U.S. cotton production, the factor that jumps to the fore here is the comparison between crops produced in the U.S. and those produced abroad for the last 25 years. I give these figures for the season 1911-12 and each fifth season thereafter.

Year	U.S. Crop Bales	Foreign Crop Bales	Total
1911-12	15,856,000	7,007,000	22,863,000
1916-17	11,559,000	7,444,000	19,003,000
1921-22	8,285,000	6,955,000	15,240,000
1926-27	18,162,000	9,808,000	27,970,000
1931-32	16,877,000	9,587,000	26,464,000
1936-37	12,250,000	17,250,000	29,500,000

The 1936-37 figures are estimates, since the season does not end until July.

It will be seen from these figures that American cotton was 69 per cent. of the world crop in 1911-12 and 42 per cent. in 1936-37; that, from 1911-12 to 1936-37, American production has decreased 21 per cent., while foreign production has increased 146 per cent. and world production has increased 30 per cent. The most sensational feature is that the foreign production almost doubled in the last five years, although this loses some of the significance when inquiry develops that the 1931-32 foreign crop was a poor one, about 2,000,000 bales below the two preceding crops.

It is clear at least that the United States has been going backward and foreign countries coming rapidly forward as suppliers to the world's cotton mills.

Why is this? Of course, there are many reasons, and I am not scholar enough to identify them all; but here are some of them:—

1. First, there are the reasons of international exchange. In 1911 we were a debtor country and had to export goods to pay our debts. The principal spinning countries abroad were our creditors and therefore could pay for our cotton and other goods by simply crediting our account against the principal and interest that we owed them. There was no exchange problem at all; our exports not only were easy but in fact were necessary to the service of our debts.

By 1926, when we had the big crop, this situation was reversed. We had become the creditors and the spinning countries abroad were our debtors. Moreover, by putting our tariffs so high that their goods were excluded from this country, we had denied them the privilege, if they wanted it, of servicing their debts in the only possible way, that is sending us their goods. However, clinging to the debtor habit of exporting our own goods, we financed their purchases of our cotton and other things by pouring out credits and loans that they had no possibility of repaying. Within the next few years the retribution for this credit policy was upon us; and we not only stopped making new loans abroad, but called for repayment of such of the old ones as could be repaid.

As we entered the present decade, it was evident that we must either (a) resume lending money that we knew the customer countries could not repay, or (b) drop our tariffs so they could pay in goods, or (c) reduce our volume of production for export to the point where, one way or another, they could dig up enough dollars or monetary metal to pay for what they had to buy.

(a) We did not go back to the deliberate making of bad loans?

(b) Despite surface scratches here and there, we refused and refuse, I think stupidly, to adjust our tariffs so as to let them pay in goods.

(c) We chose the third alternative.

One way of applying this alternative would have been to let nature effect its own cure, let prices drop to the point where those who persisted would be starved out of producing for export. That would have involved injustice to cotton producers, so much of whose trouble was traceable to a previous violation of the laws of nature, namely, to the prohibitory tariff rates. The Government, unwilling to rectify this original evil and yet unable to withstand the clamour of the farmers against the injustice of their position, has tried several artificial devices. From 1929 to 1934 it attempted at various times to peg prices by offering to lend an arbitrary price, regardless what the cotton was worth. (As a result of this, it has some 3,000,000 bales on hand to-day.) In 1930 it financed the Cotton Co-operative Associations in an attempt to peg the market and recoup their losses by a corner of the cotton futures market. Finally, it adopted the principle of asking producers of export crops to reduce their planted acreage and paying them for compliance. This principle has been expressed in various successive forms, the plough-up, the Bankhead Bill, the A.A.A., and now the Soil Conservation Act, the changes resulting from difficulties of constitution-

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ality. Regardless of these difficulties, they have exerted a powerful influence toward the curtailment of cotton acreage and, this past season, toward curbing an increase in it; and the effect has been a continual reduction since 1932 in the surplus available for export.

At the same time that they thus worked toward the reduction of export surpluses, the Roosevelt Administration facilitated the collection for them in monetary metals by depreciating the dollar, which means that we pay a high price for gold and import it as an offset to our export of goods, and by launching out into a seeming attempt to corner all the silver in the world.

To recapitulate, we alleviated our exchange difficulties by reducing our production for export and forcing our imports of gold and silver; but we remained in the position of a creditor nation that declined to accept payments freely in goods other than gold and silver.

On the other hand, our competitors in cotton production, India, China, Brazil, Argentina, etc., are debtor countries. As was the case with us before the War, they must export goods in order to service their debts abroad, also in order to pay for the capital assistance they need in the development of their countries. Need for foreign exchange and monetary metal forces them to export, whereas a plethora of it hinders us.

2. Second, there are the reasons of movements of population. Before the War, we were the goal of most of the emigration from Europe. The immigrants were productive labour and contributed greatly to the volume of our production as well as to bring our unused lands into use. Since the War we have closed down upon immigration, and the emigrants from Europe and Japan are forced to other fields. Where they go, they must make money crops; and cotton, in temperate to semi-tropical climates, is the most generally successful money crop that can be produced in one year.

3. Third, there are the reasons of relations of price between competing staples. The War started a momentum in the production of beef, wheat, coffee, sugar, and other things which eventually resulted in overproduction and distress prices. This turned agricultural activity in South America, Africa, and Asia from these products to cotton.

4. Fourth, there are the reasons of national economic independence. Afraid of their ability to pay in dollars or afraid of isolation in event of war, the consuming countries seek to foster the production of cotton in their own territories, their colonies, and countries bound to them by alliances, ties of blood and friendship, and reciprocal trade relations.

These are four of the reasons why we have declined and foreign cotton-producing countries have advanced in relative importance in supplying the world's cotton mills.

What should we expect for the future?

1. If we adhere to tariff isolation, we should expect greater difficulty with respect to international exchange, for we cannot import more gold and silver than exists in the world's stocks.

2. It seems to me we must expect continued stimulus to foreign production from immigration into the producing countries, for

Europe and Japan are bursting with population which must flow somewhere.

3. I see no way to guess the influence of price relationships with other staples; for those relationships vary continually, and always will.

4. I think we must expect the stimulus of considerations of national economic independence to become greater. As we extend our corner on the world's gold, it becomes increasingly important for a consuming country to produce cotton where she does not have to pay for it in gold. As the idea of exerting pressure upon nations through the application of economic sanctions, boycotts, etc., becomes more firmly rooted, each foresighted nation will want more and more to produce its own necessities. (I wonder often if the authors of neutrality bills think about that.)

Altogether it seems to me, as producers of cotton for export, we must recognize that we are at a handicap with our foreign competitors in most of these respects, and particularly that, whereas they are debtors internationally who are forced to export, we are creditors and, worse still, through our tariffs we refuse to import.

Unless something develops substantially changing these conditions, I think the long-range trend for American cotton exports will be downward. To a considerable extent I expect the reduction in exports to be offset by increase in domestic consumption, but not entirely; in other words, I believe conditions will force us to an eventually declining rate of production unless our tariff policy is definitely reversed.

In this connection, we all are inclined to speculate as to what, if any, part the Government will take in moulding our cotton production. Most people think that they will have little influence on the 1937 production; in fact, the general expectation is a larger acreage and a larger crop. The principal interest attaches to what they may do in 1938 and beyond. I will not go into that, for so much depends on what their constitutional power is when it comes to coercive control upon the farmer, and that again depends largely on what kind of men we will have interpreting the constitution. We will know more about that within a short time.

What does it mean to us if the United States does dwindle to a minor place in the export of cotton?

We can see something of what has happened already. When the Atlantic States were big cotton exporters, Savannah, Charleston, Wilmington, and Norfolk were important cotton markets, important ports, and enjoyed regular steamship schedules. Since the crops of the Atlantic States have been going preponderantly to the local South-eastern mills and the exports have dropped to small figures, the importance of Savannah, Charleston, Wilmington, and Norfolk has declined as cotton markets and as ports, and the steamship lines serving them have been forced, by lack of cargo, to reduce and in some cases abandon their schedules.

I do not contemplate that Houston and Galveston will face a duplication of this experience. In the first place, they serve a territory that is remote from the American cotton mills, so that

they are at a freight disadvantage in competition for American mills business, hence at a freight disadvantage in competition for export business. For these freight reasons, Texas will be one of the last states whose cotton will be diverted from export to domestic uses. On the other hand, Oklahoma, which we look on as our territory, is a pretty long haul from the Gulf, and it would not take much expansion of spinning in the South-east to draw a large proportion of the Oklahoma crop in that direction, hence away from us.

Altogether, I would say that Houston and Galveston will continue to be important factors in the cotton export business and will lose less of this business than ports located to the east of us; but I am definite in the opinion that Houston and Galveston have seen their peaks in this activity and must be prepared for a decline in it in future years, not necessarily next year, but over the long range.

This thought, of course, is not pleasant for those of us who own or work in cotton compresses here, nor for all that, in cotton firms. It cannot be pleasant for those who are interested in the steamship business here either; although they do have one hope that we have not, namely that, as the years pass, they may find some other cargo to take the place of cotton.

As for the effect of a reduction of cotton exports upon our national economy generally, I do not see that it need be greatly harmful, provided we start from the assumption that we must be reconciled to tariff isolation. Of course, if we could reverse our tariff policy it would be for the good of the country for us to export lots of it and bring lots of valuable goods in exchange. But, if we assume that this policy will not be reversed, is it a mistake for people to give up bucking the obstacle that this policy imposes and turn to some other livelihood that is not handicapped by similar obstacles?

I believe I do see, though, that a further reduction in our cotton production would force some uncomfortable readjustments. We already have seen that men and lands taken away from cotton can serve to produce dairy products, cereals, green vegetables, and fattened beef and pork. If more of them are taken from cotton, more of them will produce these things. Then the discomfort of necessary adjustments will be felt in the Middle Western States, which are accustomed to supply the country with them. Moreover, every dislocation of agricultural labour furnishes distress competition for industrial labour and undermines the general standard of living of the urban as well as the rural population. In fact our readjustments cannot fail to force painful and difficult readjustments on every part of the country.

I cannot help winding up with the observation that, if the majority of the people thought clearly enough to see their own interests and inherent rights, the tariff obstacle to our cotton export trade would be removed. We still would be handicapped in competition with those countries whose cotton production is stimulated by debtor conditions and other conditions that do not exist here; but at least we would be able to struggle for our share of the world's markets for cotton without this crushing self-imposed handicap.

INTENTIONS TO PLANT REPORT.

Commenting upon the "Intentions to Plant Report as of March 1," the *American Cotton Crop Service* states that the report indicates an increase in cotton acreage of about 10 per cent. or 2,951,000 acres more than was planted on July 1, 1936. County agricultural agents are making a determined fight to farmers from overplanting cotton and, since about 80 per cent. of the growers have already signed "work sheets," the *Service* does not believe cotton acreage will be increased as much as is generally expected. Such areas as the Panhandle section of the North-western Belt may be expected to show a heavy acreage increase but, elsewhere, only moderate increase is indicated. Along with the intensive campaign being waged by the county agricultural agents might be mentioned the "tight" labour situation. It is believed that all danger of an overproduction of cotton has been eliminated in most areas by the scarcity of farm labour and the eagerness of growers to abandon the one-crop system. Then, too, it should be remembered that a large number of potential farmers are still employed on Government relief projects.

With the planting date starting generally over the southern third and in portions of the middle third of the Belt during the week ending March 22, the moisture situation has become very important. Delay in the planting date, due to moisture scarcity, often results in poor outturns from bad stands, increased insect damage or shortened growing season. At present the moisture situation in Texas is most important, as it is generally recognized that the Western Belt crop will play a most important part in the 1937 price situation.

SEA ISLAND COTTON.

Due to high prices received for the 1936 crop of sea Island cotton, there will be an unusually heavy acreage increase in 1937. Preliminary estimates indicate Florida growers will plant approximately 20,000 and Georgia growers 6,000 to 10,000 acres to Sea Island cotton. In 1936 approximately 1,000 bales of Sea Island cotton were produced in the Georgia-Florida Sea Island Belt, which gave approximately 25,000 bushels of planting seed. At the present moment there is a seed shortage with some of the Florida growers receiving orders for seed from as far north as the southern edge of North Carolina. Under average weather conditions a total production of about 10,000 bales may be expected in 1937. Production has jumped from 15 bales grown in Florida in 1934 and 160 in 1935 to approximately 1,000 bales in 1936. A successful method of weevil control has been developed, and prospects are bright for the rehabilitation of this once highly specialized industry.

(*American Cotton Crop Service.*)

COTTON WILT IN U.S.A.

A recent survey of cotton wilt fungi by the Bureau of Plant Industry shows two distinct types of wilt responsible for damage to the cotton crop. The two types differ in many respects, and are classified as *Fusarium vasinfectum* and *Verticillium albo-atrum*.

"*Fusarium* wilt is found in the coastal plains of the east, and to a limited extent in the Piedmont and upland sections of the south-east. It is apparently more prevalent in the loose, sandy more or less acid soils of this area.

"On the other hand, wilt in the Blackland section of Texas, in Arizona and in New Mexico, first thought to be *Fusarium*, turned out to be *Verticillium*. Unlike *Fusarium*, *Verticillium* thrives in tightly packed neutral or alkaline soils.

"The only known means of combatting wilt is planting resistant or highly tolerant cotton varieties. In the south-east, plant breeders have been selecting wilt-resistant varieties for several years. Varieties resistant to *Fusarium*, however, do not withstand the attack of *Verticillium*. Little evidence has been found in the south-east to support the growing belief that different regions have strains of wilt differing so greatly that cotton resistant in one region may be highly susceptible in another."

HEAVY INCREASE IN FERTILIZER SALES.

According to the National Fertilizer Association, fertilizer tag sales in each of the 12 southern States were larger in February this year than last, with the exception of Mississippi. Substantial increases were registered by all of the heavy fertilizer-using South Atlantic States. For the first eight months of the current fiscal year, from July to February, sales in the South were 30 per cent. larger than in the corresponding period of last year, with increases shown in every state. The percentage gains range from 12 for Mississippi, to 49 for Louisiana. Increased cotton acreage and the rise in tag sales indicate a recovery this year in the amount of fertilizer used on cotton.

The 1937 Cotton Prospect.

The following is quoted from a recent communication issued by the *American Cotton Crop Service*:—

What are the prospects for cotton production in the United States in 1937 with average weather conditions and without restrictions other than the Soil Conservation Programme? In 1926 the

maximum acreage harvested was 44,616,000 acres. In 1936 acreage planted to cotton was 30,932,000 acres and 27,335,000 acres in 1935. In view of these facts and the continued favourable prices for cotton, it is reasonable to conclude that there will be an increased acreage over 1936 of about 10 per cent., or a total of 33 to 34 million acres. At the moment cotton is being planted along the extreme southern edge of the Belt and by or before any stringent legislation can be made operative, the crop in the southern half of the Belt will be planted. Therefore, most desirable and wise as the Soil Conservation Act is, it will very probably not prevent the overproduction of cotton in 1937. All of which brings up the question of what sort of control measure is best or wanted?

There is no doubt but that a large number of cotton growers wish control legislation similar to the Bankhead Act, but only on condition that fair allotments are provided which do not deprive man or land of privileges enjoyed by others. Allotments should be made so as not to penalize the farmer who has already adopted a safe and balanced cropping system, or one that deprives the small farmer of a sufficient number of acres to cash crops to meet ordinary financial needs. This brings forward the question of fair allotments—the one problem of crop production control remaining unsolved. When control legislation was adopted in 1933 an emergency existed, and there was not sufficient time to work out a just system of acreage allotments. This fact caused great hardship among some farmers—especially farmers living in the border states and who shift crops according to the price outlook. Therefore, with unfair allotments of 1933 and 1934 still fresh in mind, it is not surprising to find large numbers of farmers planting huge acreages to all crops with the idea that this is the year for establishing bases.

Sub-marginal lands are being taken out of production, and tenant farmers, who formerly planted crops on the poor soils without the aid of fertilizer, are now planting on the better soils with ample fertilizer furnished through the Resettlement Administration. In addition to increasing cotton yield as outlined above, the planting of winter cover crops is on the increase, and soils are being made to produce higher yields. In this respect we quote a recent report from the U.S. Department of Agriculture as follows: "A five-acre field near Rome, Ga., yielded one-half bale of cotton per acre in 1932; two bales per acre in 1936. In the intervening years the owner, Mr. J. S. Cutton, planted a cover crop of legumes each winter. The legumes provided a 'winter overcoat' for his field, that otherwise would have been exposed to the rains, according to the Soil Conservation Service. They also fixed nitrogen in the soil, and made it capable of supporting a heavier growth of cotton. He saved the soil of the five-acre field, increased its fertility and conserved moisture. His 1936 cash income from the field was \$740. If his 1932 crop had been sold at 1936 prices, he would have received \$185.

"More than half a million acres of crop land in the Cotton Belt will be covered with legumes throughout the winter months, as a result of the programmes of the various experiment stations, the Soil Conservation Service and other agencies advocating this practice."

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EFFECT OF EXPOSURE IN THE FIELD ON COTTON.

According to a recent publication of the Texas Agricultural Experiment Station (Bulletin No. 538), attempts to reduce the costs of cotton production have resulted in the adoption of methods of harvesting which encourage the postponement of picking until most of the bolls are open. As a result the bolls which open early are often exposed to the weather for weeks or even months. This study was undertaken to measure the extent to which the cotton was lowered in grade, staple, strength, and colour when thus exposed under normal weather conditions for various periods of time.

The cotton used was of the same variety, grown for two seasons at Temple, Chillicothe, and Lubbock regions where soil and climate differ. The grade, strength, and colour of unexposed cotton and cotton exposed from one to 33 weeks were determined. A drop of one grade had occurred after one week of exposure at one station and after an average of less than four weeks for all stations and seasons. A drop of four and five grades, a decrease in length of from $\frac{1}{16}$ in. to $\frac{3}{16}$ in., and a decrease in price of from 150 to 265 points occurred during exposure. The monetary loss due to exposure was in some cases nearly one-half the price of the unexposed cotton, or at 1932 and 1933 prices approximately \$13.00 per 500-lb. bale.

All the cotton lost strength, but not equally, upon exposure. There was an average loss of 4 per cent. after four weeks and a maximum loss of approximately 14 per cent. for the season. Cotton grown at Temple lost the lowest and that at Lubbock the highest percentage of the original strength. These differences were not due entirely to differences in rainfall but may have been due in part to greater ultra-violet in the sunlight at the higher altitude.

There were regional and seasonal differences in the colour. All cottons became darker and less creamy as the exposure increased. In all cases there was a decrease in either creaminess or brightness, or in both, within three to five weeks after opening. Precipitation apparently caused greater darkening than it did loss in creaminess. The grades appear to follow brightness more closely than they do creaminess.

Three lots of lint cotton stored in a vault for one year had lost respectively 7, 15, and 18 per cent. of their original strength, and after two years of storage two lots had lost 25 and 33 per cent.

It is concluded that cotton should be harvested, so far as is practicable, not later than four or five weeks and preferably within one or two weeks after opening to assure a product of high quality in grade, strength, and colour.

DETERIORATION OF TEXAS COTTON.

Mr. Harmon Whittington, President of the Texas Cotton Association, referring to the deterioration which has taken place in the quality of Texas cotton during recent years, made the follow-

ing statement on the occasion of the annual conference of the Association, held this year at Galveston:—

"No one connected with the merchandising of cotton in Texas has to search his memory very far to recall that not very many years ago a Texas bill of lading brought a premium for the cotton it represented when compared to cotton of a corresponding grade and staple produced in other sections of the United States, and for that matter, the balance of the world.

We all know this is not true to-day. Texas cotton has deteriorated badly, but, of course, in some sections this deterioration is much more pronounced than in others. With this deterioration in quality has come a certain amount of deterioration in our shipping standards, and the two things together certainly are not helping the prestige of Texas cotton. Some people (not many cotton merchants) still cling to the idea that foreign countries produce cotton of inferior quality, but the opposite is true. Most of the new cotton countries are producing cotton far superior to Texas cotton. In these new countries most of the planting seed is carefully selected and distributed under governmental supervision. The State Seed and Plant Board figures show that 35 per cent. of the certified seed produced in Texas last autumn has been shipped to foreign countries for planting purposes. A few years ago foreign spinners would say that they preferred American cotton—and some may still say it, but I think the spinners who do, have been influenced by the lack of continuity of supply, and the lack of experience of exporters in some of the new countries in classing and shipping even-running grades and staples. With increased production of cotton in these new countries the continuity of supply is assured, and, of course, the exporters are becoming more experienced in the technical and detail requirements of the business."

INCREASING U.S. COTTON ACREAGE.

The following is extracted from a recent communication from the *American Cotton Crop Service*:—

Late reports from crop observers show that the recent rise in cotton prices will materially affect the 1937 acreage situation. Cotton-growers now feel that no drastic control legislation will be put into operation, due to the probability of a long battle in Congress over the Supreme Court situation. The theoretical change in acreage from price received for the preceding crop has been pronounced for several weeks and added stimulus has been given the situation by the recent rise in price to above the 14-cent level. In this connection we quote a late report from Abbeville, Ga., as follows: "The outlook is for planting many extra acres in cotton this spring. There have been sold in the country about 30 cars of mules and a few horses. This spells cotton, and the farmers are hauling lots of fertilisers of a high grade.

Cotton acreage in Georgia is expected to show an increase over that of 1936, due to the ravages of blue mold in tobacco-seed beds. This disease has spread rapidly, and many acres that were intended for tobacco will be planted to cotton.

AMERICAN COTTON CONSUMPTION IN U.S.A.

Month	JANUARY, 1937, WITH COMPARISONS (Exclusive of linters)							Per cent.	
								5-year	this
								average	year
	1913-14	1932-33	1933-34	1934-35	1935-36	1936-37	1936-37	1932-38	is of
	Bales	Bales	Bales	Bales	Bales	Bales	Bales	to	5-year
								5-year	average
									Per cent.
August	432,350	404,497	588,902	418,941	408,325	574,289	449,139	127.9	—
September ..	442,435	492,742	499,482	294,696	450,847	629,727	440,380	143.0	—
October	511,923	501,893	504,055	523,032	552,840	646,499	508,569	127.1	—
November .. .	456,356	502,434	475,247	480,081	512,312	626,695	479,060	130.8	—
December .. .	456,262	440,439	347,524	417,344	499,773	692,921	424,096	163.4	—
January .. .	517,299	470,182	508,021	550,553	590,484	678,064	510,793	132.7	—
Total, six months ..	2,816,625	2,812,187	2,923,231	2,684,647	3,014,381	3,848,195	2,812,037	136.8	—
February .. .	455,231	441,203	477,046	480,339	515,977	—	473,161	—	—
March .. .	493,364	495,183	544,870	482,373	550,641	—	512,395	—	—
April .. .	499,646	470,359	512,594	468,402	576,762	—	478,920	—	—
May .. .	466,744	620,561	519,299	470,412	530,894	—	494,708	—	—
June .. .	446,145	697,261	363,262	383,982	555,449	—	464,532	—	—
July .. .	448,333	600,641	359,951	390,712	607,056	—	447,385	—	—
Total, 12 months ..	5,626,078	6,137,395	5,700,253	5,360,867	6,351,160	—	5,683,138	—	—

Linters consumed during the month of January, 1937, amounted to 63,438 bales, compared with 61,936 bales in December and 55,646 bales in January, 1936. Linters consumed during the six months ended January 31 amounted to 394,928 bales in 1937 and 357,580 bales in 1936.

GEOGRAPHICAL DIVISION OF EXPORTS OF COTTON.

	Week Ending Friday, April 2, 1937.	
	Since August 1 this year	Since August 1 last year
Great Britain ..	1,029,445	1,118,564
France ..	653,518	610,176
Germany ..	580,821	718,462
Holland ..	96,357	82,672
Belgium ..	137,179	144,158
Russia ..	400	—
Denmark ..	45,833	37,617
Norway ..	9,126	10,034
Sweden ..	62,362	64,703
Portugal ..	27,592	41,032
Spain ..	—	173,267
Poland ..	145,821	192,782
Italy ..	299,233	307,286
Greece ..	—	335
Japan ..	1,282,893	1,255,905
China ..	22,139	41,817
British Columbia ..	7,889	9,758
Finland ..	10,498	6,484
India ..	6,709	6,451
South Africa ..	689	506
South America ..	10,979	6,828
Netherlands ..	—	49
Latvia ..	1,761	459
Philippine Islands ..	281	238
Australia ..	1,750	539
Estonia ..	2,360	1,984
Hawaii ..	—	3
Canada ..	222,099	195,254
New Zealand ..	—	208
Jugoslavia ..	850	—
Total, including Shipments to Canada ..	4,658,574	5,027,571

IMPORTS OF FOREIGN COTTON INTO U.S.A.

Country of production	AUGUST 1, 1936 TO JANUARY 31, 1937, WITH COMPARISONS						Percent this year is of	
	(500 lb. bales)						5-year average	5-year average
	1912-14	1932-33	1933-34	1934-35	1935-36	1936-37	1932-36	
Egypt	37,805	34,631	44,287	41,022	29,374	32,292	33,194	97.3
Peru	7,038	2,933	2,885	682	505	526	1,590	33.1
China	2,853	20,385	8,949	2,235	9,335	10,948	8,950	122.3
Mexico	13,267	—	1,262	1,018	90	8,799	3,739	235.3
India	2,766	899	10,166	11,256	16,034	17,472	9,325	187.4
Other countries ..	299	418	862	170	691	1,601	462	346.5
Total	63,523	59,266	67,911	56,383	56,029	71,638	57,260	125.1

U.S. COTTON EXPORTS.

American cotton exports for the calendar years 1936 (preliminary figures) and 1935 are shown in the following table, in running bales:—

	1936 Bales	1935 Bales
Belgium	137,836	163,581
Bulgaria	1,076	1,288
Denmark	29,141	32,846
Estonia	8,239	12,866
Finland	31,563	28,118
France	718,718	591,065
Germany	691,341	590,184
Greece	759	9,314
Italy	339,520*	451,575
Latvia	6,834	3,739
Netherlands ..	67,842	69,541
Norway	14,199	11,115
Poland	212,132	271,113
Portugal	28,883	66,213
Spain	95,086	242,312
Sweden	86,383	81,733
United Kingdom ..	1,230,007	1,189,285
U.S.S.R. (Russia) ..	800	110,867
Yugoslavia	6,688	—
Canada	268,218	247,079
Guatemala	1,100	1,350
El Salvador	400	700
Cuba	8,030	2,780
Bolivia	2,800	2,700
Chile	1,200	722
Colombia	11,421†	14,770
Ecuador	—	200
British India	5,045	52,260
China	16,502	86,026
Indochina	25,207	3,797
Japan	1,356,060	1,517,997
Philippine Islands ..	368	200
Australia	2,519	713
Total†	5,408,547	5,860,533
Europe	3,709,597	3,928,655
Continent	2,478,990	2,739,370
Far East	1,402,814	1,660,080
Upland under 1½ in. ..	5,387,122	5,811,147
Upland 1½ in. and over ..	21,123	49,070

* Revised figures.

† The total includes small amounts to a few other countries.

CROP REPORTS.

Mr. W. M. Garrard, writing in the *The Staple Cotton Review* for March, 1937, reports as follows:—

The unshipped stock in all Delta warehouses on March 1 was 83,330 bales, compared with 165,340 bales last year. You will recall last season we considered the stock of 165,000 bales to be very small as of March 1, and subsequently practically every bale of the cotton was shipped for mill consumption. This season, with mills manufacturing at a record rate and on an extremely profitable basis, we can assume that the present stock in the Delta will also move into consuming establishments before any new crop cotton is available. We would not be surprised to see in the late spring and summer this season a situation develop that will be equally as acute as occurred last year, if not more acute.

Last year there was quite a lot of fairly desirable staple cotton pledged to the 12-cents loan. This year there is no available surplus stock of staples anywhere. With the fine yarn and cloth mills selling their products months ahead, it is only reasonable to anticipate a continued heavy mill consumption of staple cotton through the remainder of the season. As supplies of cotton become exhausted, an inevitable advance in premiums must occur.

Commenting upon general conditions in the Delta, the review states as follows:—

A rather unusual condition exists at this time, in so far as farming preparations are concerned in the Deltas, on both sides of the Mississippi River in that as a whole the entire area is fully three weeks late with its work.

The floods and backwaters have receded from the affected sections of the Arkansas Delta. Where it had been necessary to evacuate mules and labour, most of these had been returned to their farms last week, and work was being rapidly resumed. Unfavourable weather has retarded work in the central and north Mississippi Delta, while the lower section has been covered with backwater from the Mississippi River due to the high stage at Vicksburg. In spite of this hazard, the backwater area is probably in no worse shape than other sections as their lands had mostly been broken and prepared ahead of the water. In Louisiana a little more work has been done than over here. However, they are normally two weeks ahead of us; and, taking this into consideration, they are as far behind as anyone else.

Mr. C. T. Revere, of Messrs. Munds, Winslow & Potter, writes as follows, under date of April 2:—

According to official announcements, prior to April 1, approximately 1,150,000 bales have been released. This reduces Government controlled stocks to less than two million bales—in the neighbourhood of 1,800,000 bales—when all returns are in. We think it probable that the accelerated releases since March 25th, close to 200,000 bales, may have reflected the scramble for cotton due to uncertainty as to whether the operation would be closed on April 1. Nevertheless, we feel that considerably more cotton will be taken during April, thus further reducing Government holdings which have been regarded as more or less of a barrier to price improvement.

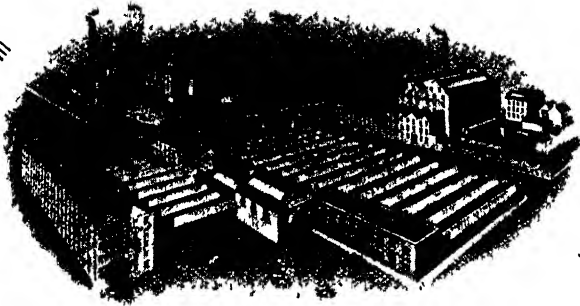
The American Cotton Crop Service, of Madison, Florida, reported as follows on April 7:—

During the week ending April 5, rain and relatively less temperatures retarded both ploughing and planting. Rainfall, together with snow, during the first part of the week, supplied much needed moisture in the Texas-Oklahoma Panhandle area. In most sections of the Central and Eastern Belts wet soils retarded crop progress. Frost during the first part of the week killed some cotton in the extreme southern edge of the Belt, and late reports indicate much replanting in the southern third zone, due to both frost and poor germination. In the Delta of the Central Belt ploughing is three to four weeks behind usual and the Central Belt crop is expected to be late instead of early, as was the case in 1936. Planting is

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expected to be further delayed during the current week on account of cold, wet soil conditions, which will cause the crop in the southern and middle third zones to be planted at about the same time. Moisture conditions have been improved in the North-western Belt and, with the aid of tractors, this area will be planted on time, provided top soil moisture continues favourable. The recent rise in the price of cotton is expected to promote some additional increase in acreage for 1937.

The cotton acreage outlook continues to indicate a decided increase in acreage for 1937. Late reports from our crop reporters show several factors affecting the situation which have not been so pronounced to date. Naturally, the recent rise in price is having a pronounced effect. Next, the good financial condition of the Belt, augmented by unusually good credit conditions supplied by the various Government lending agencies. The enormous increase in the use of tractors with a tendency to mass production on a wages basis is pronounced. The decrease in the number of relief clients who, with the aid of Resettlements funds, are preparing to plant substantial acreages. It is, of course, too early to have concrete ideas of the cotton acreage increase but it will undoubtedly be substantial, probably not falling under 10 per cent., and it may be much higher.

Messrs. Weil Brothers, of Montgomery, Alabama, in their semi-monthly crop letter, dated April 1, 1937, state the following:—

Weather conditions the last two weeks for the greater part of the Belt have been unfavourable. The main complaint is low temperatures, and in some sections rain. But, in Texas and Oklahoma very beneficial rains were had during the last two weeks, and preparation is two weeks earlier than last year. It is stated that in the Rio Grande Valley and the Corpus Christi section 100 per cent. is planted and up to a good stand, with some scattered replanting necessary. In Texas 85 per cent. of the planted cotton has come up. Nothing planted in Oklahoma thus far. Reports from Arkansas, Louisiana, Mississippi and West Tennessee are that preparations are below normal at this stage of the season. Arkansas, Mississippi and West Tennessee estimate 25 per cent. preparations to date—the normal is 40 per cent. Louisiana is 30 per cent. to 50 per cent., according to localities. Dry weather is needed.

In South Alabama, South-west Georgia, the eastern part of South Carolina and Florida, planting is normal thus far, but germination is slow because of cool and unseasonable weather. In the central and northern sections of Alabama, Georgia and South Carolina preparations for planting are well ahead of last year, and all lands seem to be in readiness for planting. Some Sections report 95 per cent. preparation. Last season replanting was necessary in most sections because of early planting. This season cool weather deterred them from planting earlier. Indications are that preparations in North Carolina are normal but not as advanced as South Carolina, Georgia and Alabama. All agree that sub-soil moisture is abundant and that warm weather is needed.

Indications point to a substantial increase in acreage, the minimum being 10 per cent.

NOTE: Large increase in fertilizer sales, December 1, 1936, through March 31, 1937.

	1932-33	1933-34	1934-35	1935-36	1936-37
North Carolina . . .	359,944	306,997	641,235	548,111	649,594
South Carolina.. . .	300,096	442,672	479,927	422,911	581,992
Georgia	96,000	446,820	571,553	494,932	622,002
Alabama	111,700	229,900	303,500	269,800	319,200

Demand is sporadic and will probably continue so though a number of mills have still to cover for June, July and August. Supply is almost entirely confined to the Loan which, unquestionably in our opinion, must reopen. We hear spinners are now receiving inquiries and business for next fall. This is most encouraging.

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ALEXANDRIA TESTING HOUSE PROGRESS REPORT, 1935-36.

Since the last Progress Report the Alexandria Testing House has shown a marked increase in all its activities.

This is particularly so in the Department dealing with humidity tests on hydraulic cotton lots arriving on the Alexandria Cotton Market from the interior. Tests on steam-pressed bales for spinners abroad have also increased.

Tests carried out during the period September to April for the last two years were as follows: 13,487 tests in 1935-36 compared with 7,910 tests in 1934-35.

These 13,487 tests represent approximately 111,000 bales tested during 1935-36.

Details of the various kinds of tests carried out are as follows:

Hydraulic Bales (Local Tests):							
Conditioned	..	..	..	..	..	11,918	
Delivered	..	..	..	..	..	329	
Drawn	..	..	..	..	..	79	
							12,326
Steam Pressed Bales (Export):							
Conditioned	..	..	..	..	..	1,110	
Drawn	..	..	..	..	..	51	
							1,161
Total	..	..	..	..	..		13,487 Tests

Considering the crop at approximately 8,274,000 cantars and taking the hydraulic bale at an average of 8.5 cantars, it is estimated that 11.4 per cent. of the crop has been tested for humidity.

The most noticeable feature in the increased demands for humidity tests is the large increase in the number of merchants and exporters using the Testing House.

In the early years of the development of the Testing House its clients were limited to a comparatively small number, and it is encouraging to note that practically all merchants and exporters now have regular, and in many cases, daily recourse to the Testing House.

This may be taken as definite evidence of the increasing degree of confidence which the local cotton market has in this Institution.

Out of the 13,487 tests carried out from September 1, 1935, to April 30, 1936, the following statement gives the various groups of humidity grades, classified in the same way as in past progress reports:—

Humidity Percentage Grades :	No. of Tests	Percentage to Total Tests
6 to 8	679	5.04
(Standard) 8.1 " 8.9	3,108	23.05
9 " 10	7,422	55.03
10.1 " 12	2,237	16.58
12.1 and over	41	0.30
Total	<u>13,487</u>	<u>100.00</u>

It must be understood that as testing is not compulsory in Egypt, many allowances were settled amicably under the Magasinier-Expert method, and therefore the statement cannot be taken as representing the condition of the whole crop.

It will be observed that high humidity percentages this year are much less common. This, it is presumed, is due to the existence of the Testing House, and should the improvement noticed in this connection be maintained it will undoubtedly improve the standard of the Egyptian crop as a whole.

Report on Progress during the Period September to December, 1936.—Since the beginning of the 1936-37 cotton season an increased interest in testing has been evident as shown by the greater number tests which has been carried out during the period from September to December, 1936, when compared with the number of tests effected during the same period in 1934-35 and 1935-36.

The following statement of tests made during September to December, in 1934, 1935, and 1936 will serve to illustrate the increased work done by the Alexandria Testing House during this period in 1936, when compared with the same period in past years:

Month	1934	1935	1936
September to December ..	2,061	6,746	12,001

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Cotton Diseases.

By TEWFIK FAHMY, D.Sc., D.I.C. Agric. Dip. (Wye),
Hon. Bot., of the Ministry of Agriculture, Cotton Research
Board, Mycological Section, Giza.

THE cotton plant suffers from several fungus and bacterial diseases. Egypt is fortunate enough to have a very limited number of these diseases; only one is of importance, namely, the "wilt disease."

The diseases that attack cotton in Egypt are the following :—

- (1) Sore-shin.
- (2) Wilt.
- (3) Angular leaf spot.

SORE-SHIN.

This disease occurs in the early age of the cotton plant.

The principal cause of sore-shin is a fungus (*Corticium vagum*. Berk and Curt), and it lives as a saprophyte in the soil on organic matter, and is able under favourable conditions to attack the seed or seedling, causing the rotting of the germinating seed or the formation of a lesion on the seedling at soil level (*Hypocotyl*) which may girdle it and cause its untimely death.

Under certain favourable soil conditions the parasite persists in the lesion at the hypocotyl, revives its activity and girdles the plant when it is from two to three months old, causing a stem-rot which in most cases is fatal.

In studying this disease it was found that certain external conditions, namely, excessive soil moisture and low temperature, are the determining factors in causing it.

The question, therefore, arose whether the fungus *Corticium vagum* is the responsible agent, or only one of the factors inducing the disease.

It was found, after investigation, that this fungus is capable of parasitizing cotton and other plants during the early stage of development under certain adverse conditions for plant growth, and that many soil saprophytes contribute to a great extent to the rotting of the germinating seed, destroying the tissue of the attacked hypocotyl.

In the light of the research carried out, it was found that to control this disease two factors should be taken under consideration :—

1. The date of sowing.
2. The soil condition during germination and seedling growth.

It is important to sow the seeds at a time when germination can progress without much delay, for it is during this period of delay that the parasite, in association with many soil saprophytes, gets the upper hand and destroys the germinating seeds. Moreover, if the seedling finds much resistance, as it comes up through the soil, either because of bad tilth or unsuitable weather con-

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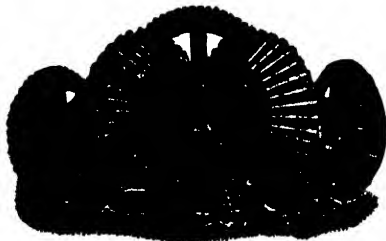
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ditions, the tissue at the hypocotyl region is soft and the parasite finds little difficulty in invading it, contrary to seedlings which have developed under better conditions, where the tissues are hardened enough to arrest invasion.

The optimum date of sowing should, therefore, be chosen and soil tilth should be good to avoid any hindrance due to presence of clogs which would weaken or retard the germinating seedling.

A method of sowing has been found which removes soil hindrances during the early development of the seedling. This consists in covering the seeds at sowing, with sand. The sand being light and friable allows the seedling to come up without difficulty, avoiding, in this way, all delay which might, under adverse weather conditions, be fatal for the young plant. Moreover, there are two other advantages in the sand sowing. First, the amount of seed used for sowing is smaller; and, secondly, there is less injury to the rootlets during the thinning; for in the sand-sown holes there is a smaller number of seedlings. Results have also shown that sand-sown fields give a better yield than in the case of those sown by the ordinary method.

COTTON WILT.

The first cotton to be grown in Egypt was Ashmouni, a native variety immune to the wilt disease. With the success of its production, and with the object of improving its quality, many foreign varieties of cotton were introduced into the country, the most important being Sea Island, a superior quality cotton but susceptible to wilt.

At that period, when there was no control over the seed distribution, the varieties grown got badly mixed, and a new variety, the Mit Affi, was selected, it was superior in quality to the Ashmouni and soon spread in the Delta. This new type was probably mostly a cross between the native wilt-immune variety, Ashmouni and the introduced susceptible Sea Island, for it was definitely resistant to wilt.

In 1907 another variety, Sakellaridis, was introduced. Being very superior in quality, it soon spread and became the most important variety in the country. Unhappily, Sakel is very susceptible to wilt. In 1923, when the present writer started investigating this disease, wilt had become a real menace to the fine cotton production of Egypt.

THE DISEASE.

The parasite, which is known technically as *Fusarium vasinfectum*, lives in the soil and invades the water-conducting vessels, entering the plant through its root system.

The symptoms of the disease appear under field conditions when plants are about three months old, sometimes earlier and sometimes later, depending on the temperature.

The symptoms are of two kinds —

(A) *External.*

- (a) A yellow network on the leaf
- (b) The death of the plant starting from the growing-point.

(B.) *Internal.*

- (a) The presence of a characteristic olive-green discoloration in the central cylinder of the root.

The disease is present in the Delta and is most severe on fertile land, while in the less fertile northern parts wilt may be severe or light, depending on the amount of detrimental salts present in the soil, especially in the form of sodium chloride, which when present beyond a certain amount prevents the occurrence of the disease besides being detrimental to the plant. The disease increases with the frequency of susceptible cotton growing on infected fields and appears on less fertile land when it is improved.

The parasite being present in the soil, often to the depth of one metre, it is not economically possible to rid the soil of it, and even if this was possible it would not prevent the land from becoming re-infected. The only sound method to control the disease is by growing immune types.

THE CONTROL OF THE DISEASE.

The best method of controlling the disease is by growing immune varieties. Desirable immune varieties may naturally exist or it may be necessary to select them. In the case of cotton, and prior to 1928 when the wilt disease was doing a great deal of havoc, the Egyptian long-staple varieties in existence, were susceptible. Sakel, the most important and the most widely grown, was also the most susceptible. The first attempt to select wilt immune strains out of Sakel failed to give rise to a type which could replace Sakel without disadvantage. Later on, however, several long-staple strains were selected which were of excellent quality and highly resistant to wilt. The first success was Sakha 4, a long-staple selection made by the Botanical Section of intermediate resistance which was improved by a special selection against wilt. Later on many other strains were selected, such as Giza 7, Giza 12, Giza 27, Giza 29, Giza 30, Giza 32, etc. Some are selections made by the Botanical Section direct which did not require wilt resistance improvement, others were reselected to improve their resistance while others were selected from the start for resistance.

In general, the tendency is for the best quality long-staple strains to be susceptible and medium-staple high-yielding types to be immune, although cases do occur where long-staple types are immune and medium-staple type shows high susceptibility.

In all cases it is essential to test all new strains, and if necessary to reselect from them to improve their resistance without reducing their quality.

By the selection of immune strains it has been possible to control a disease which was causing a great deal of loss, not less than £E.100,000 a year, and which would have increased had the susceptible varieties been continued to be grown to the same extent.

ANGULAR LEAF SPOT.

This disease is of minor importance to Egypt, but of considerable importance to the Anglo-Egyptian Sudan.

It is caused by a bacterium, *Bacterium Malvacearum*, which in Egypt infects the leaves of the adult plants (August to October), causing a small angular spot where the tissue is destroyed.

In the Anglo-Egyptian Sudan the disease attacks the seedling at about the same time (August to October) as it attacks the adult plants in Egypt.

In Egypt cotton is sown from February to April, and by August, when the disease appears, the plants are fully developed,

while in the Anglo-Egyptian Sudan the cotton is sown from July to August, and is in the seedling stage when the disease starts to appear, causing in this case considerable damage to the young plant.

The reason for the appearance of the disease at about the same time in both countries is because the temperature and humidity prevalent at that time are similar and of such a nature as to encourage the attack and the spread of the disease. Moreover, in the Anglo-Egyptian Sudan there are at that time frequent rains which are important in favouring the attack to a still more severe degree.

We have received from the Egyptian Ministry of Agriculture a pamphlet entitled "Spinning Egyptian Long-staple Cotton." The pamphlet deals with the alteration in spinning technique involved in changing over a cotton mill from shorter staples to Egyptian cottons.

MARKET REPORTS.

Messrs. Reinhart & Co., Alexandria, Egypt, communicate the following, under date of April 2, 1937:—

Spot Market. Minet-el-Bassal has been considerably less active of late. The demand from abroad is sporadic, spinners following the advance with reluctance only. During the three working days of the week not more than 4,005 bales were sold, of which 1,859 bales Ashmouni, 393 bales Zagora, 744 bales Giza 7, 308 bales Sakellaridis, 219 bales Maarad, and 482 bales of other varieties.

Premiums of Sakellaridis, Maarad and Giza 7 have further advanced this week with the exception of those of the lower grades, which remain somewhat depressed. As there exists little demand for such cotton, though it actually can be bought at fairly reasonable prices, stocks of Maarad, medium grades Giza 7 and higher grades Sakellaridis are almost exhausted, and business in these qualities becomes more and more difficult. Premiums of Ashmouni have a weakening tendency on account of the increasing discounts on the futures board for later deliveries. Premiums of Zagora, however, are all well maintained.

CROP REPORT.

The crop report published by *Messrs. Cicurel & Co.*, of Alexandria, on April 1, contained the following:—

It is quite possible that a crop of about 10,000,000 cantars may be raised. For one thing, the extra acreage being planted to high yield varieties may produce 700,000 to 800,000 cantars. On the other hand, the increase in Giza goes to the detriment of poor yield varieties, hence another 100,000 cantars. Taking into consideration that last year's crop was about 9,000,000 cantars, it is therefore quite likely for Egypt to grow 10,000,000 cantars this year. Of course, so much will depend on weather vagaries, pest attacks, etc., that this is only given for the sake of comparison and information.

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East Indian Cotton.



Final General Memorandum on the Cotton Crop of 1936-37.

This memorandum is based on reports received from all the provinces and States, and refers to the entire cotton area of India. It deals with both the early and late crops of the season. Information regarding the late crops in certain tracts, chiefly in Madras, Bombay and Hyderabad, is not, however, complete at this stage. A supplementary memorandum will therefore be issued at a later date, containing full and final figures for the above-mentioned tracts together with revised estimates, if any, for other areas.

The total area now reported is 25,050,000 acres, as against 24,936,000 acres, the revised estimate at this date last year, showing an increase of 114,000 acres only. The total estimated yield now stands at 5,959,000 bales of 400 lbs. each, as compared with 5,771,000 bales (revised) at the corresponding date of last year, or an increase of 188,000 bales or 3 per cent.

The condition of the crop, on the whole, is reported to be fairly good.

The detailed figures for each province and State are shown below :—

Provinces and States	Acres		Bales of 400		Yield per acre	
	(thousands)		lbs. each		lbs.	
	1936-37	1935-36	1936-37	1935-36	1936-37	1935-36
Bombay*	5,890	5,696	1,062	1,142	72	80
Central Provinces and Berar	3,969	4,068	810	641	82	63
Punjab*	3,692	3,519	1,746	1,565	189	178
Madras*	2,461	2,601	533	545	87	84
United Provinces*	695	596	174	195	100	131
Sind*	976	844	433	343	177	163
Burma	511	518	113	105	88	81
Bengal*	75	73	26	24	139	132
Bihar	31	32	6	6	77	75
Assam	36	38	13	15	144	158
Ajmer-Merwara	34	35	12	13	141	149

FINAL GENERAL MEMORANDUM ON THE COTTON CROP—*continued.*

Provinces and States	Acres		Bales of 400		Yield per acre	
	(thousands)		(thousands)		lbs.	
	1936-37	1935-36	1936-37	1935-36	1936-37	1935-36
North-West Frontier Province	21	19	4	3	76	63
Orissa	6	6	1	1	67	67
Delhi	2	2	1	1	160	168
Hyderabad	3,076	3,676	499	622	65	68
Central India	1,372	1,201	190	180	55	60
Baroda	871	837	131	156	60	75
Gwalior	718	602	121	124	67	82
Rajputana	535	486	73	79	55	65
Mysore	79	87	11	11	56	51
Total	25,050	24,936	5,959	5,771	95	93

* Including Indian States

A statement showing the present reported estimates of area and yield according to the recognized trade descriptions of cotton, as compared with those of the preceding year, is given below:—

Descriptions of Cotton	Acres		Bales of 400		Yield per acre	
	(thousands)		(thousands)		lbs.	
	1936-37	1935-36	1936-37	1935-36	1936-37	1935-36
Oomras :						
Khandesh	1,295	1,279	253	295	78	92
Central India	2,090	1,803	311	304	60	67
Barsi and Nagar	1,918	2,459	338	440	70	72
Hyderabad-Gaorani	841	937	141	140	67	60
Berar	2,716	2,848	586	446	86	63
Central Provinces	1,253	1,220	224	195	72	64
Total	10,113	10,546	1,853	1,820	73	69
Dholleras	2,743	1,951	436	424	64	87
Bengal-Sind :						
United Provinces	695	596	174	195	100	131
Rajputana	569	521	85	92	60	71
Sind-Punjab	2,508	2,470	1,120	1,039	179	168
Others	43	44	9	9	84	82
Total	3,815	3,631	1,388	1,335	146	147
American :						
Punjab	1,614	1,529	813	718	201	188
Sind	569	385	251	155	176	161
Total	2,183	1,914	1,064	873	195	182
Broach	1,436	1,356	320	311	89	92
Coompta-Dharwars	1,114	1,415	158	189	57	53
Westerns and Northern	1,597	2,101	173	268	43	51
Cocanadas	160	166	28	27	70	65
Tinnevellies	564	481	145	124	103	103
Salems	182	173	36	35	79	81
Cambodias	514	566	206	221	160	156
Comillas, Burmas and other sorts	629	636	152	144	97	91
Grand total	25,050	24,936	5,959	5,771	95	93

CROP REPORT.

Messrs. Ralli Brothers, Ltd., of London, communicate the following, dated March 24, 1937:—

INDIAN COTTON ESTIMATES (in thousands) SEASON SEPT./AUG.

(Bales of 392 lbs. net)

	1936/1937		1935/36	1934/35	1933/34
	Previous	Present	Final	Final	Final
Oomras	2,535	2,480	2,086	1,980	2,343
Bengal/Sind	1,420	1,365	1,534	1,577	1,415
American Surats	1,670	1,745	1,451	843	851
Broach/Surti	735	625	598	360	551
Dholerah	510	475	464	305	378
Comptah/Dharwar	215	220	185	220	256
Western/Northern/Dekkan/Carnats	385	355	387	293	317
Coconada	40	40	50	45	37
Tinnivelly/Cambodia	495	495	402	400	434
Comilla styles	50	50	56	52	52
Rangoon, etc.	155	110	114	110	100
Receipts (net yield, plus previous undistributed surplus)	8,210	7,940	7,327	6,185	6,734
Handspindles and mills' loose takings	750	750	750	750	750
	8,960	8,690	8,077	6,935	7,484
Supplies in India :—					
Less previous season's undistributed surplus	966	966	841	1,204	1,041
Yield (gross) : Our estimate	7,994	7,724	7,236	5,731	6,443
Government's	5,800 ?	5,960 ?	5,728	4,858	5,108
Acreage : estimate of final	25,250	25,250	25,138	24,023	24,137
Distribution of above supplies :					
Europe, etc.	1,650	1,750	1,645	1,394	1,422
Japan	1,900	2,250	2,222	1,776	1,750
China, etc.	100	50	150	50	350
Indian mills	2,400	2,400	2,344	2,124	2,008
Indian mills loose takings	250	250	250	218	222
Handspindles, etc.	500	500	500	532	528
Total takings	6,800	7,200	7,111	6,094	6,280
Undistributed surplus	2,160	1,490	966	841	1,204

For Indian cotton most of the demand is for staple varieties that may be used instead of Americans, the basis for which is high and with very little offering. Generally speaking, however, with the recent unsettled markets, the demand was smaller.

The new crop Indian prices are a matter of conjecture. In view of the extremely wide parity of the present crop under American cotton, it is more generally expected now that the new crop Indians will rule at premiums over old crop Indians, especially as, the present crop being so much bigger than any of its predecessors, it is more likely that the next crop will turn out smaller. As this season's crop is almost 500,000 bales bigger than the previous one, was grown on about the same acreage and represents a high yield per acre, it would be too optimistic to expect as big a crop next season.

THE PINK BOLL-WORM IN INDIA.

The Indian Central Cotton Committee, at its 34th half-yearly meeting, held in Bombay on March 2 and 3, 1937, considered and approved the draft rules under the United Provinces Cotton Pest Control Act, which has been forwarded by the United Provinces Government for opinion. The Committee recorded their appreciation that the proposed legislation was in the interest of cotton-growers and cotton trade in United Provinces, and passed the following resolution:—

"The Indian Central Cotton Committee places on record its satisfaction that the United Provinces Cotton Pest Control Act has been passed by the United Provinces Legislative Council, and trusts that no time will be lost in giving effect to the rules under it. It is confident that this piece of legislation will go a long way towards improving the quality and yield of cotton in the tracts to which it will be applied, and that both the cotton-growers and the cotton trade in the United Provinces will benefit."

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INDIAN COTTON SCIENTISTS' CONFERENCE.

The Publicity Officer, Indian Central Cotton Committee, writes that an important conference of scientific research workers on cotton in India, the first of its kind in India, with a view to discuss many technical and scientific questions connected with the improvement of cotton from a purely scientific standpoint was held in Bombay under the auspices of the Indian Central Cotton Committee on March 4, 5 and 6, 1937. The Conference was presided over by Sir Bryce Burt, officiating Vice-Chairman of the Imperial Council of Agricultural Research and President of the Indian Central Cotton Committee, on the first day, and by Dr. W. Burns, officiating Agricultural Expert, on the second and third day. The Conference was attended by a large number of cotton research workers from all parts of India, including junior cotton research workers besides a number of professors from local colleges.

INDIAN CENTRAL COTTON COMMITTEE.

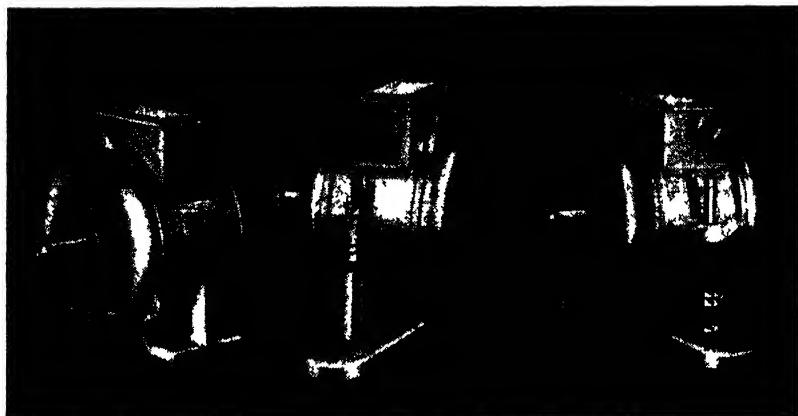
A reasoned account of improvements in cotton production, the extension of improved types into general cultivation, and in the marketing conditions and manufacture of Indian cottons is now available in the Indian Central Cotton Committee's annual report for the year ending August 31, 1936, which has just been published.

As usual, the report begins with a survey of the work done during the year under review. Satisfaction can be derived from the fact that, in view of the risk India ran by depending too much on the limited market for her short-staple cotton, investigations undertaken by the Committee into possibilities of growing cotton of long and medium staple in the present short-staple cotton areas of India, have provided valuable information for framing future cotton policy of the country. Apart from the establishment of long and medium staple strains in areas suitable to their growth, dry farming methods of cultivation in certain areas and evolving new cotton strains for development in the Dholleras tract was started to meet practical exigencies.

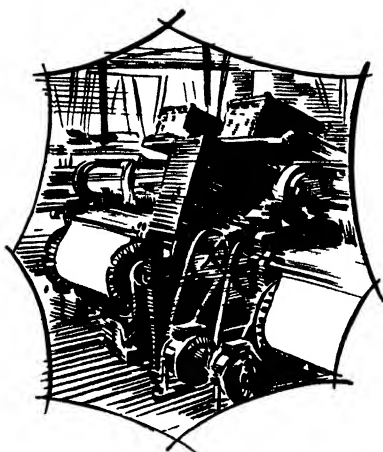
Steady progress was maintained in the matter of encouraging superior types of cotton by eradicating inferior short-staple varieties growing in the same tracts, which as a result of the malpractices of mixing spoil the reputation of good quality Indian cottons. A bill for the prohibition of the cultivation of the inferior Garrow Hill cotton, duly endorsed by the Committee, was introduced in the Central Provinces Legislative Council.

The Report can be obtained from the Secretary, Vulcan House, Nicol Road, Bombay; price Rs.2 net.

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"Metrovick" Loom Motors are designed to withstand the arduous conditions prevailing in Weaving Sheds and are giving unfailing service throughout the Textile Industry.

As illustrated, the motors are supplied either with feet, hinged base or spring suspension.

The sketch shows "Metrovick" $\frac{1}{2}$ h.p. Loom Motors driving Looms by means of Vee Ropes or Chains.

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Large Loom Beams.

THE following is taken from an article prepared by Mr. J. F. Culpepper, and which appeared in a recent issue of the American publication, *Cotton*:—

The author states in the introduction that the trend is to larger packages throughout the mill, and the use of larger loom beams is on the increase. One method of attaining greater production and efficiency in the weaving shed is through the use of the larger loom beam head that will contain a greater amount of warp yarn. During the past few years the machine engineer has been especially active; from his store of experiences, imagination, and ambition, has come the development of manufacturing processes in every department of the cotton mill. With new opening machinery and controlled conditions under which to run it, single-process picking, long draft drawing, roving, and spinning, and better warp preparation, and the introduction of the high-speed loom, the textile industry is passing through a self-contained industrial revolution.

The larger loom beam had been used to advantage on the standard speed looms for a number of years, and with the inception of the high-speed loom, the large beam is especially desirable to offset the problem of warping.

The volume of a cylinder (technically a loom beam is a cylinder) is the radius multiplied by itself, multiplied by 3.1416, multiplied by the length. This may be expressed by the formula $\pi (r)^2 \text{ length}$. In other words, *the area of the beam head is proportional to the square of the radius*. From this it is seen that the larger the radius, the more yarn the cylinder or beam may contain. Much more area is gained by adding an inch to the flange of the beam than is gained by reducing the barrel of the beam the same amount. For instance, if we have a loom beam running on our looms and the barrel of the beam has a radius of 2.5 inches (the radius is the distance from the centre of the beam to the outside of the barrel), and the beam head has a radius of 9 inches (this is measured from the centre of the beam to the outside edge of the beam head), then this beam head will hold 234.83 square inches of yarn. As this is for comparison of beam heads only, we shall not consider the length of the beam in our calculations. Now, if we wish to add more yarn to this beam by reducing the size of the barrel, or the barrel

of the beam radius by one inch, we have 247.40 square inches of yarn or 12.57 square inches more of yarn, which is a gain of only 5.3 per cent. by reducing the barrel of the beam. This reduction of the size of the beam barrel is not practical and so far as we know, it never has been done; this point is only used as an illustration.

The size of the beam barrel on the regular 18-in. head is 5 inches in diameter. When increasing from the 18-in. head with the 5-in. barrel to the 20-in. head retaining the 5-in. barrel, there is a gain of 25.4 per cent. yarn contained on the beam. Often when changing to larger beam heads the size of the beam barrel is changed also. The following percentages of gain when changing from one size beam head to another, using different diameter beam barrels, are as follows:—

From 18 in. head, 5 in. barrel to 20 in. head, 5 in. barrel, increase 25.4%
From 18 in. head, 5 in. barrel to 20 in. head, 6 in. barrel, increase 21.8%
From 20 in. head, 6 in. barrel to 22 in. head, 6 in. barrel, increase 23.0%
From 18 in. head, 5 in. barrel to 22 in. head, 6 in. barrel, increase 49.8%

To venture to say exactly how much more yarn may be added by changing from a small beam to a large beam would involve misinformation as each individual case is different. Some mills change from the 18-in. beam head with the 5-in. barrel to the 20-in. head with the 5-in. barrel, still others use the 20-in. head with the 6-in. barrel. It has been claimed that as much as 55 per cent. more cotton yarn may be put with ease on the beam having the large head, and that it may be run satisfactorily.

When there is more yarn on the beam, it will run longer before a new warp must be tied in the loom. This increases the production of the loom by the number of hours saved in warping, and permits the loom fixer to work elsewhere those hours. When the pay of the fixer, the production of the loom, and the amount of waste saved by tying-in fewer warps is counted, it is an item worth considering. This is true of a plain mill where all warps are the same, but it is an especially important item in a fancy mill where the loom must stand for several hours while the pattern is being tied. One of the greatest advantages of the large beam is that the tying-in expense is cut. One mill that has only partially gone on the larger beams is saving a considerable amount in this department.

A concrete example of this is given in the following letter of a manufacturer of the large beams to a mill considering changing to the 22-in. beam heads:—

“In order to strike an average condition, we selected a warp with 3,200 ends of 18's warp yarn, 42 picks per inch, and a loom speed of 155 picks per minute. At present you are getting 500 yards on your 20-in. beam heads. At this rate each loom will run out 46 beams per loom per year, based on 80 hours per week. 421 looms would therefore run out 19,366 beams per year. The waste per beam now figures approximately 12 ounces; the total waste on 19,366 beams would be 14,524 lbs. The information given here is based on 100 per cent. production, but in order to arrive at what we would consider a practical result, we have assumed that you will average only 95 per cent. production. On this basis the total waste would be 13,797 lbs. The cost of the yarn including cotton at 12 cents per pound, figures 21 cents per pound; therefore the total amount of waste at 95 per cent. production comes to \$2,897.37.

"A 22-in. diameter beam head would run about 21 per cent. longer than your 20-in. beam heads. The reduction in the waste would be in proportion, or in other words, a saving of \$608.45.

"It is now costing you 11.18 cents per 1,000 ends for tying-in. Based on a warp of 3,200 ends, this cost figures 36 cents per warp. By equipping these looms with 22-in. heads you would use in the course of a year 3,680 beams less than you are now using. This figures a saving in tying-in cost of \$1,324.80.

"The smash hand is now handling 100 looms at \$13.00 per week, which figures 13 cents per loom. On a basis of 421 looms this cost is \$2,845.96 for one year. With 22-in. diameter beam heads the smash hand should handle about 120 looms at a cost of 11 cents per loom per week. This figures a saving of \$437.84 per year for smash hands.

"The man who now warps up the looms handles 300 looms at \$13.00 per week. The saving in this case would be about one-third the saving in smash hands, or a total of \$145.95.

"Thus, as you will see, figures a total saving per year of \$2,417.04. On the basis of this estimate the return on the investment for the necessary parts to change your looms figures 40.8 per cent. In other words, the equipment could be paid for in less than 2½ years.

"Each loom would average being out of production one hour when a warp runs out. On this basis you would save in the course of a year 3,680 loom hours."

The larger beams will increase the production of the slasher to some extent, but when the weave room is first changing to the large beams it may be necessary for the slashers to run over time in order to supply warps.

Before deciding definitely to change to the larger beams, the mill executive should bear in mind that the warp alleys will not be the same width because the beams will be larger—thus leaving less space. However, should the warp alleys be too small to allow a beam to pass down them, a special lift truck has been devised that will lift the warp beam high enough so that it may pass easily to the loom. Other mills employ a hydraulic lift valve and an overhead trolley to move the beams. However, these instances are rare, and with the regular print cloth beam little difficulty has been met in getting the beams to their destination.

Also, the executive should remember that there are a few changes to be made on the slasher and several settings to be changed on the looms. The let-off gear that is used with the small beam will not always operate with the large beam, but these gears may be obtained at a small cost.

FIBRE FINENESS OF AMERICAN COTTON.

The discovery of the variability and importance of fibre fineness by the U.S. Fibre and Spinning Laboratories has pointed to a new target for cotton breeders which may ultimately place American cotton in a much stronger position to compete for the

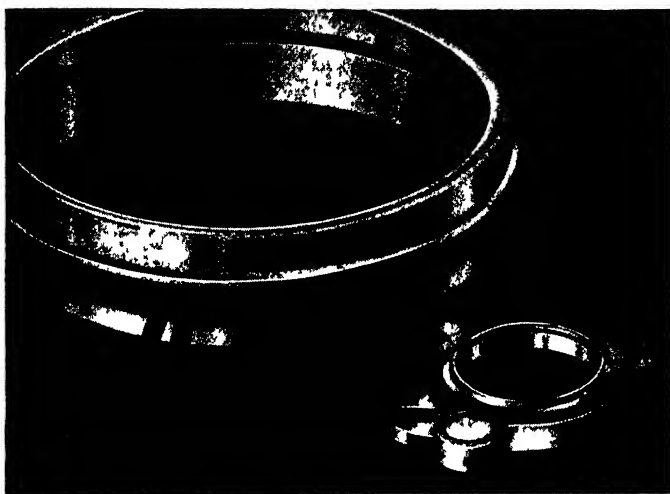
world cotton business. Recent tests show that yarns made from cut Sea Island fibres have given strength approximately 50 per cent. greater than that of yarns made from natural-grown American cotton of similar staple lengths. A short staple cotton (Hopi) of $1\frac{3}{8}$ in. staple has been found with such fineness and related fibre properties as to give spinning results ordinarily obtained with Delta $1\frac{1}{4}$ in. cotton. In crossing this cotton with Acala the first generation cross of Hopi-Acala, $1\frac{1}{8}$ inch staple length, has given spinning results comparable with those obtained from cotton of $1\frac{1}{2}$ ins. in staple length. Yarns made from such fine-fibred cottons require less twist than cottons of like staple length, thus reducing the cost of manufacture. Studies and selections are now being made with hundreds of samples representing further crosses with Hopi and upland types and between Sea Island and upland types, grown in different parts of the country. It is expected, therefore, if fibre fineness in American cotton can be increased, the position of American cotton will be better able to meet competition in world markets.

(American Cotton Crop Service.)

Changes in the Lancashire Weaving Trade.

An interesting lecture on the above subject was recently delivered to members of the Bradford Textile Society by Mr. W. Wilkinson, O.B.E., F.T.I. The lecturer gave an outline of the development of the Lancashire weaving industry during recent years, with special reference to its adoption of rayon and other materials in addition to cotton. He stated that refined power looms, or modernized looms, represent a class which is being introduced to meet the requirements of the industry when cotton is woven in conjunction with rayon or other materials. Many of the high grade and fancy fabrics which are to be the backbone of the industry may not be produced successfully on the ordinary looms and many of the weaving sheds do not allow the required space for working these looms. The change in machinery or the modernization of existing machinery is not a difficult problem, but the unsuitability of many of the weaving sheds is most serious for the industry. Extra height for jacquard machines, space for increased warp stretch, additional warp beams, large cloth rolls, and other conveniences, are not available in many of the weaving sheds.

Refinements in tappet motions in which the point of crossing is equal on all changes of the sheds, and where the correct amount of dwell is given, together with connections that are not subject to atmospheric changes have reduced warp breakages and strain on the warp. Improved dobby shedding motions may be cam-driven, having a dwell period, and have increased facilities for adjusting the size of the respective sheds, for slating the sheds, and to correctly incline the sheds. Grease cup lubrication and anti-



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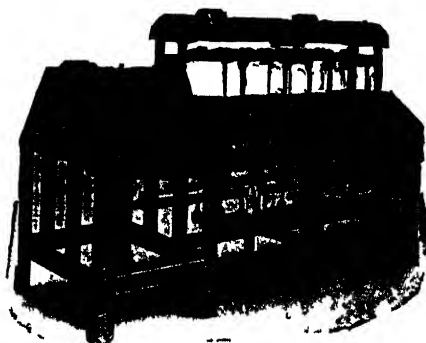
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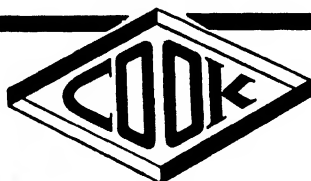
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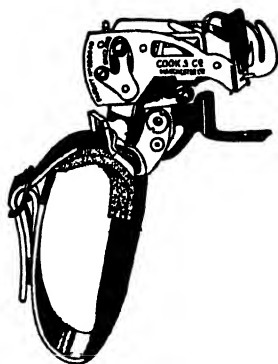
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PATENT AUTOMATIC WEAVER'S KNOTTER

THIS machine ties the flat or Weavers' Knot, and is used in winding for trades where the ordinary knot is too bulky, such as folded gassed yarns, wool and mixture yarns.

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splash devices are points of interest. Paper pattern chains which give facilities for long repeats without the use of cross border mechanisms are in more general use.

Modern weaving machinery now provides pick finding motions which permit the shedding motion and box motion to be set without movement being given to the reed. Jacquard fine-pitch machines are in more general use and jacquards have greater facilities for adjusting cylinders, knives, and other parts. Harnesses have been improved in order to eliminate friction and wire and steel mail mountings have been introduced and used to advantage in many mills for the finer sets, and when weaving fine cotton and rayon warps.

There is a decided tendency to adopt the under picking motion for modern looms in order to dispense with the use of the ordinary picker and spindle and so reduce the oil and dirt stains.

The mechanism of the shuttle box plays an important part in the traverse of a fly shuttle and controlled swells and double swells are applied in modern looms. The 90-deg. or right-angle setting for the sley and reed is a feature of these modern looms. This principle is often worked in connection with front swells to give a straight line from one shuttle box to the other. There are, however, many new ideas connected with the traverse of the shuttle that may not be quite so successful in practice as in theory, and it is suggested that the cone over pick and a few degrees of bevel on the reed and box backs, with the shuttle in harmony, has still much to recommend it. A main factor in successful shuttle traverse is "minimum shuttle speed" for a given loom speed, and in this connection the cone over pick is an ideal mechanism.

A forward inclined movement may be given to the top of the reed at the beat-up. The advantage is greatest when fine yarns in densely crowded reeds are being woven, the tendency is to split the fine filaments of silk or rayon yarns being reduced considerably. There is also an advantage in the reduced shock at the fell of the cloth which tends to lay the pick more uniformly when weaving fine rayon warps, and the moving reed reduces the tendency to slip back the filaments broken at the beat-up.

It is suggested that a controlled reed, which is held back from the fell when the weft is broken or the pirn finished, is a more practicable method of preventing the fell from being disturbed than the sudden stoppage of the crankshaft, which is being fitted to many Continental looms.

Cloth control and take-up motion are the weak spots in power looms and modern looms will not be satisfactory if provided with the old form of mechanism.

Modern looms will not only have cut gears in the take-up motion but in the best types, an entirely new system of cloth control and take-up device will be used. It is almost impossible to obtain a correct spacing of the picks with an ordinary take-up motion, and the existing method of cloth control. The ideal system of cloth control and take-up mechanism for the most delicate silk and rayon fabrics will not meet the requirements for medium and certain classes of high grade fabrics. It is therefore essential to discover a system of cloth control, accurate take-up, together with tension adjustment for the fell of the cloth, that may be fitted to

power looms and occupy the minimum space in order to enable the looms to be placed conveniently in the existing weaving sheds.

Although many new motions have been introduced giving tension control or automatic let-off of the warp, it is suggested by many manufacturers that there is not yet a really satisfactory motion for the requirements of high-grade cotton and rayon fabrics.

When densely crowded warp sheets are being woven, it is necessary to have a division of warp over two or more bars or rollers. The best method of mounting the beam for high speed looms is in special brackets placed as high as the yarn guide will permit. This may be three to six inches higher than most beams are for cotton textures, owing to the reduced size of the beam flanges, or the beam without flanges, and position of yarn guide. The guide should take the form of a smooth hardwood roller, or rollers, with suitable ends for allowing the roller to rotate uniformly. It is an advantage to have spring bearings if the texture is light or medium and a uniform structure, such as plain twill or satin.

Weft feelers, until recently, were only considered when automatic weft supply mechanisms formed part of the loom, but now they are largely used on all types of looms to stop the loom just before the whole of the weft is unwound from the pirn, tube or cop, and so enable the weaver to meet the pick with the least disturbance to the fell and minimum amount of trouble.

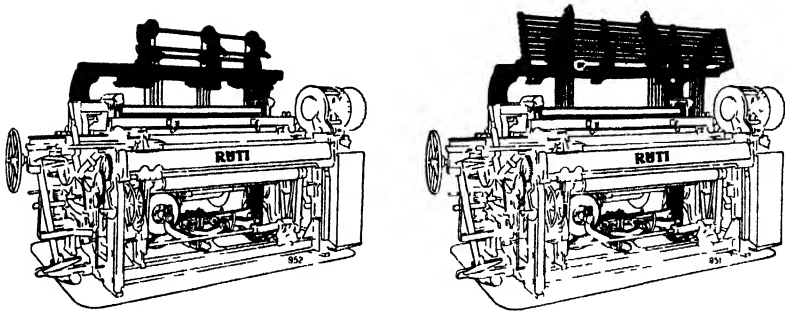
Greater attention is being paid to weft stop motions and there is a tendency to make greater use of the centre weft stop motion together with a more efficient braking device, which stops the loom before the reed touches the fell of the cloth in the shed with the broken weft inserted.

Warp stop motions are used for high grade fabrics and the castle wall type with the three or four banks or lines of detector wire has proved very successful. The warp stop motion has considerable influence upon the sheet of warp in stretch and, in addition to dispensing with the use of the lease rods, it takes the form of a damping medium, and may assist in the weaving of many types of fabrics. The main use is to detect broken warp threads and stop the loom immediately.

Multiple box motions of all types have been in demand for the modern looms, including box motions at both ends of the sley (pick-and-pick loom). The positive two-box weft mixing motions applied to power looms have a limited use, and it is suggested that the six-shuttle circular, or four-shuttle rise and fall box, with simple control in relation to the shedding motion, will play a greater part in the modern weaving machinery of the future.

Even the modernized looms have many limitations and are not suitable for all classes of rayon fabrics, and many manufacturers have installed "Continental" looms with success. The looms for rayon are made stronger to give the least vibration, and the mechanisms are made more suitable for warp and cloth control. Shuttle traverse and all motions connected with the picking of the shuttle are suitably designed for the purpose. These looms are being manufactured by the textile machinists in this country and are modelled on the lines of the silk looms made on the Continent.

(Textile Manufacturer.)



Do you notice the difference in your shed?

Background : The shadow-casting tall loom with superstructure and harness suspension in the centre with all its disadvantages.

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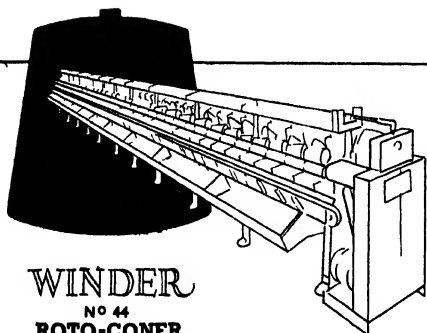
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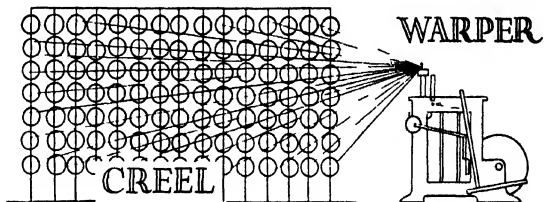
Winterthur

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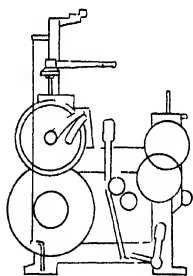


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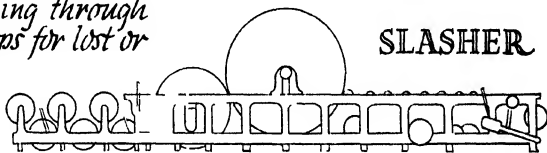
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NEW HIGH-SPEED WARPING MACHINE.

A new high-speed warping machine, which incorporates many innovations, has recently been placed on the market by the firm of Franz Muller, of M. Gladbach, Germany. The machine is constructed to permit thread speeds up to 495 yards per minute to be attained, the speed depending upon the type of material being warped.

The machine frame is wide and low in shape, and its rigid construction enables it to be run at very high speeds with the minimum of vibration.

The warping comb is fitted with a changing device, by means of which, a slightly crossed winding on the warp beam can be obtained if required. This type of winding is particularly suitable for the production of beams with a small number of threads: the mechanism can be adjusted to a size of 2 ins. if required.

The machine is fitted with an electric blower, the blow pipe being situated underneath the warp comb. The pipe, which extends over the whole width of the machine, is placed on the slant, and has an oscillating motion. Any fly which has settled on to the comb is thus blown away towards the back of the machine. The machine stops automatically when the length of thread, which can be set as required on the indicator, has been wound on to the warp. The measuring indicator can be set again at the previously set length measurement, direct, for a subsequent warp beam, by simply pressing a lever, as opposed to previous types of indicators, in which a number of rollers had to be reset each time to the required length measurement.

In the event of a thread breaking, the machine is stopped instantaneously by an electro-magnet. When a thread breaks in the warping creel by means of a fall needle an electric contact is made thus closing the circuit, and causing a relay and locking device on the machine to be released and immediately stopped by means of a magnet. The magnet immediately becomes dead and the circuit is changed over to the signal mechanism, whereupon a signal lamp lights up in that group of threads in which the breakage has taken place.

The driving drum is mounted on ball bearings. The drive is effected by an exceptionally sensitive friction clutch, operated by a foot-pedal, which enables the machine to be started slowly. This is a very great advantage when warping fine yarns, where it is essential to eliminate yarn breakages as far as possible. On stopping the machine, the driving drum is slowed down and brought slowly and gently to a standstill by a brake fitted inside the driving drum. The braking mechanism of the driving drum is also connected with an interior brake apparatus on each side of the warping machine, which act on the warp beam.

The chief merits of the machine appear to be high warping speed, and high production; high yarn content of the warping beam; uniform pressure of the warping beam against the driving drum; constant and regular tension on the warp threads, and no vibration on the warp beam.

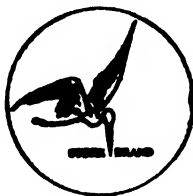
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INTERNATIONAL COTTON STATISTICS



The present tabulation is the **FINAL** result of the Census of Cotton Consumption in the Cotton Spinning Mills of the countries making returns for the half year ended 31st January, 1937, and of Cotton Mill Stocks on that date. It should be borne in mind that the figures published herewith relate to raw cotton only, and do not contain linters or waste cotton of any kind whatsoever. The spindle figures refer to raw cotton spinning spindles only and contain no waste or doubling spindles.

The International Committee is pleased to record that returns are once again being received from Germany. Owing to the Italian Association being precluded by official restrictions from supplying statistical information, and the continued omission of Russia to send returns in spite of repeated applications, the International Cotton Committee has decided that, for the present, no useful purpose would be served in attempting to issue figures purporting to show the World's Total Mill Consumption and Stocks. We have again been unable to obtain returns from Spain.

Estimates have been prepared for Russia and Spain, but it has not been deemed advisable to make any estimates for Italy.

The International Committee hopes, however, that the statistics supplied in respect of those countries making returns—which it is intended to issue as before—will be of comparative value with those issued for previous years.

In publishing the following tabulations of cotton mill consumption and stocks therefore, the International Committee wishes it to be clearly understood that they are not submitted as World tabulations, but only in order to furnish some guide to the present position of cotton consumption and stocks in those countries making returns.

The total Cotton Mill Consumption for the Half Year ended 31st January, 1937, in countries which have furnished returns, compared with that of the same period of the previous year, is as follows. In making comparisons it should be remembered that none of the tabulations below includes figures for Italy, and that the January, 1936, figures are also *exclusive* of Germany:

	31st January 1937	31st January 1936	Increase or Decrease over same period in 1936
	bales	bales	bales
American Cotton ..	6,309,000	5,747,000	+ 562,000
East Indian Cotton ..	2,891,000	2,655,000	+ 236,000
Egyptian Cotton ..	565,000	508,000	+ 57,000
Sundries ..	4,572,000	3,602,000	+ 970,000
All kinds of Cotton ..	14,337,000	12,512,000	+1,825,000

The total Cotton Mill Stocks on 31st January, 1937 and 1936, in countries reporting, according to Continental distribution, were as follows:

American Cotton:

Europe .. 364,000 bales *against* 363,000 bales on 31st Jan., 1936.

Asia .. 242,000 " " 248,000 " " " "

America .. 2,097,000 " " 1,460,000 " " " "

The total Mill Stocks of American Cotton on 31st Jan., 1937, were 2,708,000 bales, as against 2,089,000 bales in the year 1936.

East Indian Cotton:

Europe .. 190,000 bales *against* 163,000 bales on 31st Jan., 1936.

Asia .. 1,073,000 " " 756,000 " " " "

Altogether the Mill Stocks of East Indian Cotton were 1,268,000 bales against 927,000 twelve months ago.

Egyptian Cotton:

Europe .. 159,000 bales *against* 174,000 bales on 31st Jan., 1936.

Asia .. 40,000 " " 41,000 " " " "

America .. 19,000 " " 17,000 " " " "

The total Mill Stocks of Egyptian Cotton were 244,000 bales against 237,000 bales twelve months ago.

Sundry Cottons :

Europe .. 699,000 bales *against 558,000 bales on 31st Jan., 1936.*
 Asia .. 693,000 " " 432,000 " " " "
 America .. 132,000 " " 114,000 " " " "

The **Total Mill Stocks** of all kinds of cotton on Jan. 31st, 1937, in countries reporting, were 5,900,000 bales against 4,463,000 bales on Jan. 31st, 1936.

The **World's Total Spindles** on Jan. 31st, 1937, inclusive of Italy, showed 150,960,000 as against 151,745,000 in July last.

N. S. PEARSE, *General Secretary.*

SHORT-TIME TABLE

The spindle hours stopped by the firms reporting, when worked out over the whole industry of each country, indicate the following stoppages in weeks of 48 hours, and also the following percentages of full time worked. The calculations are based on a 48 hour working week, except where otherwise stated, and the half-yearly periods covered comprise 25 working weeks, one being subtracted for holidays. It should also be noted that short time taken up by plant and machinery idle during the whole of the six months has been taken into account. Most current estimates make no allowance for this; hence they are in some cases considerably higher as regards percentage of full time worked.

	Half-year ending Jan. 31st, 1937	Half-year ending July 31st, 1936		
	Short Time worked (in weeks)	Percentage of Full Time worked	Short Time worked (in weeks)	Percentage of Full Time worked
Great Britain	4.86*	81	5.64	77
France	4.24†	83	5.45	78
Germany	1.91	92	No reply	No reply
Italy	No reply	No reply	No reply	No reply
Czecho Slovakia	4.63	81	5.88	76
Belgium	3.38	87	3.40	86
Poland	2.76	89	3.05	87
Switzerland	3.46	86	4.30	83
Holland	2.67	89	4.06	84
Austria	4.37	82	5.11	79
Sweden	0.54	98	1.18	95
Portugal	0.66	97	None	100
Finland	1.19	95	None	100
Hungary	0.25	99	0.36	98
Yugo-Slavia	None	100	None	100
Denmark	0.31	99	10.30	59
Norway	0.45	98	1.22	95
Japan	17.73†	72(a)	17.72	72(a)
China	11.14**	84(b)	13.92	80(b)
Canada	2.84	88	3.19	87
Mexico	0.48	98	0.68	97
Brazil	0.98	96	1.25	95

(a) Based on working week of 120 hours.

(b) Based on working week of 132 hours.

U.S.A. In Jan., 1937, 24,365,000 spindles were active out of a total of 27,288,000 as compared with 23,250,000 active last January.

* The stoppage of the American Section amounted to 5.76 (6.27) weeks, and that of the Egyptian Section to 3.84 (4.87) weeks of 48 hours. There were 37 (46) firms with 1,763,064 (2,233,552) spindles in the American Section completely stopped during the period under review. In the Egyptian Section 8 (6) firms with 538,208 (305,192) spindles were completely stopped during the six months.

† This figure represents working weeks of 48 hours. The general working week in Japan is 120 hours. Calculated in Japanese working weeks the stoppage is equal to 7.09 (7.09) weeks for the last six months under review.

** The working week in China is 132 hours. Calculated in Chinese working weeks the stoppage is equal to 4.05 (5.06) weeks for the period under review.

‡ France: 846,106 (1,111,861) spindles have been completely stopped during the past six months. Figure does not include holidays with pay (96 hours), legalised in August 1936.

(Figures in brackets and in *italic* refer to previous six months.)

SPECIFICATION OF PART OF THE COTTON RETURNED AS "SUNDRIES" (IN ACTUAL BALES)
Six Months ending January 31st, 1937, estimated from Actual Returns.

CONSUMPTION

Country	Peruvian	Brazilian	Argentine	West Indian	Mexican	Turkish	Russian	Iraq	Sudan	East African	West African	South African	Australian	Chinese	Others	Total
Great Britain ..	70,953	144,264	48,175	7,478	3,014	1,477	—	545	72,951	23,415	13,862	614	24	—	361,000†	899,134
France ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	10,640	581,000
Italy ..	3,121	36,404	6,850	—	—	1,495	—	—	4,335	—	19,016	—	—	—	—	81,961
Belgium ..	4,339	8,824	682	—	—	10	—	—	401	—	38,245	—	—	—	3,052	55,553
Switzerland ..	2,086	954	29	—	—	17	—	—	1,553	1,363	3,611	431	—	—	—	10,044
Poland ..	4,751	11,191	150	—	303	1,104	—	—	1,428	75	—	—	—	—	—	19,002
Holland ..	2,804	5,264	—	—	333	—	—	—	235	246	35,008	—	—	—	23,275	67,165
Czechoslovakia ..	1,226	6,919	—	415	114	800	—	—	646	349	14,037	302	—	—	6,440†	31,238
Austria ..	242	2,072	134	—	762	—	—	482	624	1,267	18,816	—	—	—	—	25,099
Sweden ..	—	—	—	—	—	—	—	—	—	1,162	—	—	—	—	—	1,162
China ..	—	—	—	—	—	—	—	—	—	—	—	—	—	1,187,548	9,352	1,188,696
Brazil ..	—	32,908	—	—	—	—	—	—	—	—	—	—	—	—	—	32,908
Mexico ..	—	—	—	—	101,911	—	—	—	—	—	—	—	—	—	—	101,911
Japan ..	—	—	—	—	—	—	—	—	—	72,201	—	—	—	6,925	—	79,126
Hungary ..	33	889	—	—	—	—	—	—	571	2,717	2,531	—	—	—	—	3,917
India ..	1,855	186	48	26	—	565	—	—	8,415	116,803	3,455	10,830	—	—	1,020	145,638
Total ..	91,410	573,717	56,088	7,919	106,437	5,468	—	1,027	91,159	221,598	148,591	12,177	24	1,194,473	928,902	3,138,990

STOCKS

Great Britain ..	10,991	15,583	5,953	3,297	198	572	—	107	29,390	4,854	817	274	—	—	175	72,211
Germany ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	45,000†	45,000
France ..	2,949	15,574	4,025	—	406	—	—	—	10,673	—	9,465	—	—	—	8,008	51,160
Italy ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Belgium ..	1,306	9,137	453	—	—	—	—	—	211	17,528	—	—	—	—	745	29,390
Switzerland ..	1,226	710	—	—	—	7	—	—	1,092	1,746	3,040	1,088	—	—	—	8,909
Poland ..	394	1,019	23	—	—	740	—	—	485	—	—	—	—	—	—	2,661
Holland ..	2,316	4,849	122	—	282	—	166	—	310	15,286	—	—	—	—	17,978	41,809
Czecho-Slovakia ..	360	1,903	—	220	305	298	—	—	420	169	2,573	—	—	—	1,484	7,682
Austria ..	33	1,836	—	356	—	—	—	345	324	—	4,878	—	—	—	7,772	7,772
Sweden ..	—	173	—	—	—	—	—	—	—	126	357	—	—	—	656	656
China ..	—	—	—	—	—	—	—	—	—	—	—	—	—	—	589,579	589,579
Brazil ..	—	102,326	—	—	—	—	—	—	—	—	—	—	—	—	102,326	102,326
Mexico ..	—	—	—	24,532	—	—	—	—	82	594	1,564	—	—	—	24,532	24,532
Hungary ..	—	40	628	—	—	—	—	—	4,729	25,164	1,875	2,004	—	—	2,908	2,908
India ..	1,670	147	—	12	—	—	—	—	—	—	—	—	—	—	—	—
Total ..	21,285	153,885	10,576	3,529	25,673	2,023	166	452	47,716	32,653	57,383	3,366	—	—	75,115	1,015,695

* Includes 697 bales Paraguayan, and 407 bales Cyprus.

† Includes 1,205 bales Paraguayan and 498 bales Persian.

Bale Weights (Gross) in lbs.: Peru 480, Brazil 596, Argentina 500, West Indian 500, Mexico 500, Russia 396, Iraq 413, Sudan 450, E. Africa 410, W. Africa 414, S. Africa 500, Australia 511, Chinese 520, Paraguay 463, Peru 500.

† Not specified separately.

‡ No returns received.

Estimated COTTON MILL CONSUMPTION with previous figures for comparison, on basis of Spinners'

	COUNTRIES	IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half-year ending				Half-year ending			
		Jan. 31 1937	July 31 1936	Jan. 31 1936	Jan. 31 1935	Jan. 31 1937	July 31 1936	Jan. 31 1936	Jan. 31 1935
	EUROPE :—								
(1)	Great Britain ..	621	733	645	533	202	196	190	170
(2)	France ..	343	357	307	259	107	95	106	91
(3)	*Germany ..	119	?	?	?	87	?	?	?
(4)	†Russia ..	6	59	52	2	—	—	—	—
(5)	*Italy ..	?	?	?	223	?	?	?	93
(6)	Czecho-Slovakia ..	123	131	113	88	35	30	23	21
(7)	Belgium ..	78	74	78	58	84	62	68	51
(8)	**Spain ..	48	79	104	127	12	16	26	31
(9)	Poland ..	97	108	111	109	1	3	11	2
(10)	Switzerland ..	15	14	15	19	6	5	6	6
(11)	Holland ..	41	42	41	42	23	22	22	23
(12)	Austria ..	44	49	51	38	14	12	21	14
(13)	Sweden ..	65	60	56	60	1	—	1	1
(14)	Portugal ..	15	19	23	25	2	2	1	1
(15)	Finland ..	25	25	25	26	—	—	—	—
(16)	Hungary ..	30	29	23	27	6	7	6	7
(17)	Yugo Slavia ..	16	20	15	18	14	15	14	10
(18)	Denmark ..	20	14	17	17	—	—	—	—
(19)	Norway ..	6	6	6	5	—	—	—	—
	Total ..	1,712§	1,819||	1,682||	1,676‡	594§	465||	495||	521‡
	ASIA :								
(1)	India ..	9	21	49	22	1,230	1,351	1,266	1,323
(2)	Japan ..	618	772	842	828	978	844	821	915
(3)	China ..	38	39	70	152	43	31	39	118
	Asia Total ..	665	832	961	1,002	2,251	2,226	2,126	2,356
	AMERICA :								
(1)	U.S.A. ..	8,767	3,263	2,947	2,613	39	30	25	8
(2)	Canada ..	144	121	117	120	—	—	—	—
(3)	Mexico ..	—	—	—	—	—	—	—	—
(4)	Brazil ..	—	—	—	—	—	—	—	—
	America Total ..	3,911	3,384	3,064	2,733	39	30	25	8
	Other Countries ..	21	33	40	33	7	14	9	7
	HALF-YEAR'S TOTAL ..	6,309§	6,068||	5,747||	5,444	2,891§	2,735||	2,655||	2,892‡

* No returns received in July, 1936, or Jan., 1936 and 1935

† No returns from Russia. Figures for this country are estimated from trade sources

** No returns from Spain July, 1936, or Jan., 1937. Figures for July, 1936 and Jan., 1937, estimated.

for the Half-year ending 31st January, 1937,
returns made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES (regardless of weight)											
EGYPTIAN				SUNDRIES				TOTAL			
Half-year ending				Half-year ending				Half-year ending			
Jan. 31 1937	July 31 1936	Jan. 31 1936	Jan. 31 1935	Jan. 31 1937	July 31 1936	Jan. 31 1936	Jan. 31 1935	Jan. 31 1937	July 31 1936	Jan. 31 1936	Jan. 31 1935
184	175	181	181	389	281	332	367	1,396	1,385	1,348	1,251
70	70	72	53	82	77	96	65	602	599	581	468
44	?	?	?	351	?	?	?	601	?	?	?
—	—	—	—	1,129	914	1,038	919	1,135	973	1,090	921
?	?	?	44	?	?	?	31	?	?	?	391
25	21	21	17	31	19	23	15	214	201	180	141
5	3	5	3	55	43	69	45	222	182	220	157
16	21	34	28	11	14	23	15	87	130	187	201
17	16	14	19	19	13	11	13	134	140	147	143
21	19	19	22	10	8	6	3	52	46	46	50
2	1	1	1	67	53	51	28	133	118	115	94
10	9	9	9	25	19	20	10	93	89	101	71
3	3	3	2	3	1	1	2	72	64	61	65
2	3	3	2	22	15	10	15	41	39	37	43
1	1	1	1	2	2	3	2	28	28	29	29
6	7	8	5	7	20	9	4	49	63	46	43
4	5	3	1	6	5	7	4	40	45	39	33
—	—	—	—	1	1	1	1	21	15	18	18
—	—	—	—	—	—	1	1	6	6	7	6
410§	354||	374||	388||	2,210§	1,485||	1,701||	1,540||	4,926§	4,123||	4,252||	4,125||
29	18	36	23	146	141	130	122	1,414	1,531	1,481	1,490
44	43	43	43	301	198	88	89	1,941	1,857	1,794	1,875
15	12	12	15	1,197	1,073	1,064	1,034	1,293	1,155	1,185	1,319
88	73	91	81	1,644	1,412	1,282	1,245	4,648	4,543	4,460	4,684
24	22	23	31	14	13	6	9	3,844	3,328	3,001	2,661
4	3	6	6	—	2	—	—	148	126	123	126
—	—	—	1	102	93	111	96	102	93	111	97
—	—	—	—	353	337	317	312	353	337	317	312
28	25	29	38	469	445	434	417	4,447	3,884	3,552	3,196
39	37	14	14	249	243	185	171	316	327	248	225
565§	489||	508||	521||	4,572§	3,585||	3,602||	3,373||	14,337§	12,877||	12,512||	12,230||

|| Exclusive of Germany and Italy.

† Exclusive of Germany.

§ Exclusive of Italy.

Estimated COTTON MILL STOCKS on comparison on basis of Spinners' returns

COUNTRIES		IN THOUSANDS OF ACTUAL BALES (regardless of weight)							
		AMERICAN				EAST INDIAN			
		Half-year ending				Half-year ending			
		Jan. 31 1937	July 31 1936	Jan. 31 1936	Jan. 31 1935	Jan. 31 1937	July 31 1936	Jan. 31 1936	Jan. 31 1935
EUROPE :									
(1) Great Britain ..		61	54	61	48	43	69	29	36
(2) France ..		103	88	93	92	57	98	67	64
(3) *Germany ..		15	?	?	?	19	?	?	?
(4) †Russia ..		—	6	—	2	—	—	—	—
(5) *Italy ..		?	?	?	149	?	?	?	60
(6) Czecho-Slovakia ..		36	29	43	33	9	12	7	11
(7) Belgium ..		29	32	31	24	31	44	30	37
(8) **Spain ..		Nil	15	17	17	Nil	5	4	5
(9) Poland ..		5	12	6	12	1	2	2	—
(10) Switzerland ..		20	11	18	14	6	8	3	7
(11) Holland ..		26	18	24	24	8	18	6	11
(12) Austria ..		11	9	12	11	4	4	4	4
(13) Sweden ..		21	19	25	26	—	—	—	—
(14) Portugal ..		2	3	5	5	—	1	—	1
(15) Finland ..		10	5	5	5	—	—	—	—
(16) Hungary ..		9	6	7	3	2	6	1	2
(17) Yugo Slavia ..		7	4	7	8	10	12	10	5
(18) Denmark ..		5	5	7	7	—	—	—	—
(19) Norway ..		4	3	2	2	—	—	—	—
Europe Total		364§	319||	363||	482†	190§	279||	163||	243†
ASIA :									
(1) India ..		4	9	16	18	865	932	627	761
(2) Japan ..		228	205	214	285	206	310	124	179
(3) China ..		10	19	18	50	2	24	5	21
Asia Total		242	233	248	353	1,073	1,266	756	961
AMERICA :									
(1) U.S.A. ..		2,034	856	1,404	1,149	4	8	7	8
(2) Canada ..		63	59	56	87	—	—	—	—
(3) Mexico ..		—	—	—	—	—	—	—	—
(4) Brazil ..		—	—	—	—	—	—	—	—
America Total		2,097	915	1,460	1,236	4	8	7	8
Other Countries		5	8	18	13	1	4	1	2
HALF-YEAR'S TOTAL		2,708§	1,475||	2,089||	2,084†	1,268§	1,557||	927||	1,214'

* No returns received in July, 1936, or in January, 1936 and 1935.

† No returns from Russia. Figures for this country are estimated from trade sources.

** No returns from Spain July, 1936, or Jan., 1937. Figures for July, 1936, and Jan., 1937, estimated.

31st January 1937, with previous figures for made to the International Cotton Federation.

IN THOUSANDS OF ACTUAL BALES (regardless of weight)											
EGYPTIAN				SUNDRIES				TOTAL			
Half-year ending				Half-year ending				Half-year ending			
Jan. 31 1937	July 31 1936	Jan. 31 1936	Jan. 31 1935	Jan. 31 1937	July 31 1936	Jan. 31 1936	Jan. 31 1935	Jan. 31 1937	July 31 1936	Jan. 31 1936	Jan. 31 1935
58	51	65	61	72	69	60	73	234	243	215	218
43	51	49	31	51	63	59	51	254	300	268	238
11	?	?	?	45	?	?	?	90	?	?	?
—	—	—	—	415	263	356	250	415	269	356	252
?	?	?	51	?	?	?	29	?	?	?	289
11	8	12	7	8	5	8	8	64	54	70	59
2	2	2	2	29	17	20	26	91	95	83	89
Nil	8	11	12	Nil	3	5	3	Nil	31	37	37
2	3	1	4	3	2	1	4	11	19	10	20
20	14	19	17	9	8	7	5	55	41	47	43
1	1	1	1	41	22	22	24	76	59	53	60
4	4	4	3	8	6	5	3	27	23	25	21
2	2	3	2	1	1	1	1	24	22	29	29
1	1	2	1	8	5	5	5	11	10	12	12
—	1	1	—	1	1	1	2	11	7	7	7
2	3	3	2	3	4	3	2	16	19	14	9
2	1	1	—	5	5	4	3	24	22	22	16
—	—	—	—	—	—	1	1	5	5	8	8
—	—	—	—	—	—	—	—	4	3	2	2
159§	150||	174||	194†	699§	474||	558||	490†	1,412§	1,222||	1,258||	1,409†
15	13	17	16	35	62	57	40	919	1,016	717	835
20	20	21	35	74	66	42	25	528	601	401	524
5	5	3	6	584	344	333	386	601	392	359	463
40	38	41	57	693	472	432	451	2,048	2,009	1,477	1,822
16	17	13	18	5	10	6	12	2,059	891	1,430	1,187
3	2	4	6	—	1	—	—	66	62	60	93
—	—	—	1	25	41	25	37	25	41	25	38
—	—	—	—	102	92	83	111	102	92	83	111
19	19	17	25	132	144	114	160	2,252	1,086	1,598	1,429
26	14	5	5	156	126	106	94	188	152	130	114
244§	221||	237||	281†	1,680§	1,216||	1,210||	1,195†	5,900§	4,469||	4,463||	4,774†

|| Exclusive of Germany and Italy.

† Exclusive of Germany.

§ Exclusive of Italy.

ESTIMATED TOTAL WORLD'S COTTON¹ years ended 31st Jan., 1937, and 31st July, the International

	COUNTRIES	TOTAL ESTIMATED NUMBER OF SPINNING SPINDLES		MULE SPINDLES	
		Half-year ended		Half-year ended	
		Jan. 31, 1937	July 31, 1936	Jan. 31, 1937	July 31, 1936
	EUROPE :				
(1)	Great Britain ..	39,938	41,391	29,186	30,387
(2)	France	9,932	9,932	2,403	2,403
(3)	Germany	10,247	10,109**	2,996	3,263**
(4)	Russia†	9,900	9,800	1,000	2,187
(5)	Italy	5,483‡	5,483‡	570‡	570‡
(6)	Czecho-Slovakia ..	3,548	3,562	1,427	1,450
(7)	Belgium	1,995	2,009	276	284
(8)	Spain	2,070	2,070	431	431
(9)	Poland	1,704	1,707	454	455
(10)	Switzerland	1,272	1,241	396	413
(11)	Holland	1,221	1,220	274	269
(12)	Austria	777	773	242	232
(13)	Sweden	591	592	36	44
(14)	Portugal	471	466	132	136
(15)	Finland	314	310	42	42
(16)	Hungary	312	304	37	37
(17)	Yugo Slavia	163	152	37	40
(18)	Denmark	99	99	—	—
(19)	Norway	47	48	6	8
	Total Europe ..	90,084	91,268	39,945	42,651
	ASIA :				
(1)	India	9,877	9,705	587	596
(2)	Japan	11,853	10,867	8	20
(3)	China	5,071	5,010	—	—
	Total Asia ..	26,801	25,582	595	616
	AMERICA :				
(1)	U.S.A.*	27,288	28,157	439	400
(2)	Canada	1,129	1,110	64	66
(3)	Mexico	865	862	7	7
(4)	Brasil	2,714	2,712	5	5
	Total America ..	31,996	32,841	515	478
	Other Countries ..	2,079	2,054	272	289
	Grand Total ..	150,960	151,745	41,327	44,034

* U.S.A.—The division between mule and ring and the number of spindles on Egyptian is only approximate.

† No return from Russia. Figures for this country are estimated from trade sources

‡ Figures for half-year ending July 31, 1935.

SPINNING SPINDLES (000's omitted) for the half-1936, on basis of returns made to Cotton Federation.

RING SPINDLES		SPINDLES SPINNING EGYPTIAN COTTON		SPINDLES IN COURSE OF ERECTION		
Half-year ended		Half-year ended		Half-year ended		
Jan. 31, 1937	July 31, 1936	Jan. 31, 1937	July 31, 1936	Jan. 31, 1937	July 31, 1936	
10,752	11,004	16,545	16,998	42	18	(1)
7,529	7,529	2,216	2,083	14	9	(2)
7,251	6,846**	870	1,455**	—	?	(3)
8,900	7,613	—	—	150	?	(4)
4,913†	4,913†	700†	700†	?	?	(5)
2,121	2,112	642	667	3	4	(6)
1,719	1,725	69	51	8	1	(7)
1,639	1,639	207	207	—	—	(8)
1,250	1,252	361	344	21	5	(9)
876	828	588	739	5	1	(10)
947	951	15	23	—	—	(11)
535	541	83	127	—	—	(12)
555	548	45	37	—	8	(13)
339	330	45	45	—	9	(14)
272	268	29	28	—	1	(15)
275	267	74	62	—	8	(16)
126	112	30	32	8	12	(17)
99	99	1	—	—	—	(18)
41	40	—	—	—	1	(19)
50,139	48,617	22,520	23,598	251	77	
9,290	9,109	638	500	15	34	(1)
11,845	10,847	1,073	862	80	150	(2)
5,071	5,010	—	—	—	44	(3)
26,206	24,966	1,711*	1,362	95	228	
26,849	27,757	1,000	1,000	?	?	(1)
1,065	1,044	67	78	—	—	(2)
858	855	—	5	3	3	(3)
2,709	2,707	—	—	—	2	(4)
31,481	32,363	1,067	1,083	3	5	
1,807	1,765	403	324	43	51	
109,633	107,711	25,701	26,367	392	361	

** Figures for six months ending July 31st, 1934.

TOTAL WORLD.

Date	Total Estimated Number of Spinning Spindles existing in world	ESTIMATED MILL STOCKS—In thousands of ACTUAL BALES (000's omitted) "INVISIBLE" SUPPLY					Per 1,000 Spindles Total, all kinds of Cotton
		AMERICAN	EAST INDIAN	EGYPTIAN	SUNDRIES	TOTAL	
Feb. 1, 1938†	153,133,000	2,089	927	237	1,210	4,463	29.14
" 1935*	155,157,000	2,084	1,214	281	1,192	4,771	30.77
" 1934	157,718,000	2,873	1,210	244	941	5,268	33.39
" 1933	158,984,000	2,699	832	208	803	4,542	28.57
" 1932	162,070,000	2,775	984	212	637	4,608	28.43
" 1931	163,571,000	2,427	1,212	202	745	4,586	28.04
" 1930	165,143,000	2,742	1,173	224	792	4,931	29.86
" 1929	165,104,000	2,958	1,216	182	938	5,294	32.06
" 1928	164,979,000	2,867	969	183	863	4,882	29.69
" 1927	164,616,000	2,982	829	173	771	4,755	28.88
Mar. 1, 1913	142,186,000	3,448	716	279	973	5,416	38.09
Aug. 1, 1936†	151,745,000	1,475	1,557	221	1,216	4,469	29.45
" 1935*	153,778,000	1,651	1,516	258	1,133	4,558	29.04
" 1934	156,878,000	2,307	1,655	272	1,103	5,337	34.02
" 1933	157,755,000	2,558	1,527	235	730	5,060	32.01
" 1932	161,002,000	2,543	1,031	228	660	4,462	27.71
" 1931	162,278,000	1,871	1,565	217	660	4,313	26.58
" 1930	164,108,000	1,985	1,607	237	609	4,498	27.41
" 1929	164,211,000	2,129	1,761	228	745	4,863	29.61
" 1928	165,103,000	2,112	1,728	170	777	4,787	28.99
Sept. 1, 1913	143,449,000	1,655	1,405	273	744	4,077	28.42

ESTIMATED COTTON MILL CONSUMPTION—In thousands of ACTUAL BALES (000's omitted)

Half year ending								
July 31, 1936†	151,745,000	6068	2735	489	3585	12877	84.86	
Jan. 31, 1936†	153,133,000	5747 } 11815	2655 } 5390	508 } 997	3602 } 7187	12512 } 25389	81.71 } 166.57	
July 31, 1935*	153,778,000	5409	2710	563	3519	12201	79.34	
Jan. 31, 1935*	155,157,000	5444 } 10853	2889 } 5599	521 } 1084	3363 } 6382	12217 } 24418	78.78 } 158.12	
July 31, 1934	156,878,000	6513	2403	564	3098	12578	80.18	
Jan. 31, 1934	157,718,000	7022 } 13535	2369 } 4772	544 } 1108	2599 } 5697	12534 } 25112	79.47 } 169.65	
July 31, 1933	157,755,000	7323	2161	472	2514	12470	79.04	
Jan. 31, 1933	158,984,000	6847 } 14170	2059 } 4220	462 } 934	2514 } 5028	11882 } 24352	74.74 } 153.78	
July 31, 1932	161,002,000	6202	1976	493	2121	10792	67.03	
Jan. 31, 1932	162,070,000	6117 } 12319	2812 } 4788	487 } 980	2114 } 4235	11530 } 22322	71.14 } 138.17	
July 31, 1931	162,278,000	5630†	2850	459	2385	11324	69.75	
Jan. 31, 1931	163,571,000	5278 } 10908	3013 } 5863	394 } 853	2479 } 4864	11164 } 22488	68.25 } 138.00	
July 31, 1930	164,108,000	5940	3102	435	2530	12007	73.16	
Jan. 31, 1930	165,143,000	7083 } 13023	2985 } 6087	502 } 937	2632 } 5162	13202 } 25209	79.94 } 153.10	
July 31, 1929	164,211,000	7463	2604	492	2455	13014	79.25	
Jan. 31, 1929	165,104,000	7613 } 15076	2574 } 5178	497 } 989	2184 } 4639	12868 } 25882	77.94 } 187.19	
Year ending								
Aug. 31, 1913	143,449,000	14630	3977	946	3447	23000	160.84	

* Consumption and stock figures exclusive of Germany.

† Consumption and stock figures exclusive of Germany and Italy

Read
 THIS... and
 think of YOUR Blowroom

3rd November 1935.

PLATT BROS & CO LIMITED
 The Maple Mill Ltd.,
 Withershaw,
 OLDHAM.

Electro-Pneumatic System of Lap Making.

We append herunder a short questionnaire on which we should appreciate your considered replies to the points raised.

1. What are the principal advantages that have accrued from the conversion of your Blowing Room plant to the Electro-Pneumatic System?.....
2. What, if any, increase of production has resulted in the Blowroom?.....
3. Are any improvements noticeable on the Cards as a result of the conversion of the Blowroom?.....
4. Are the laps produced more regular than the laps produced on the old system?.....
5. If they are more regular, how much more regular are they?.....
6. Are they as clean or cleaner?.....
7. Does the upkeep of the plant cost more than before?.....
8. Is the atmosphere of the Cotton Chamber, Blowing Room and Cardroom improved?.....

*Our yarn is much brighter and slightly stronger
 From 150 to 20 lbs per hour
 The sliver is cleaner and more regular
 More regular
 20% the variation now being reduced to a minimum
 cleaner
 No
 Yes
 Maple Mill Ltd.,
 John Harrison,
 Managing Director.*

PLATT BROTHERS & CO LIMITED
Frank A. Kingston

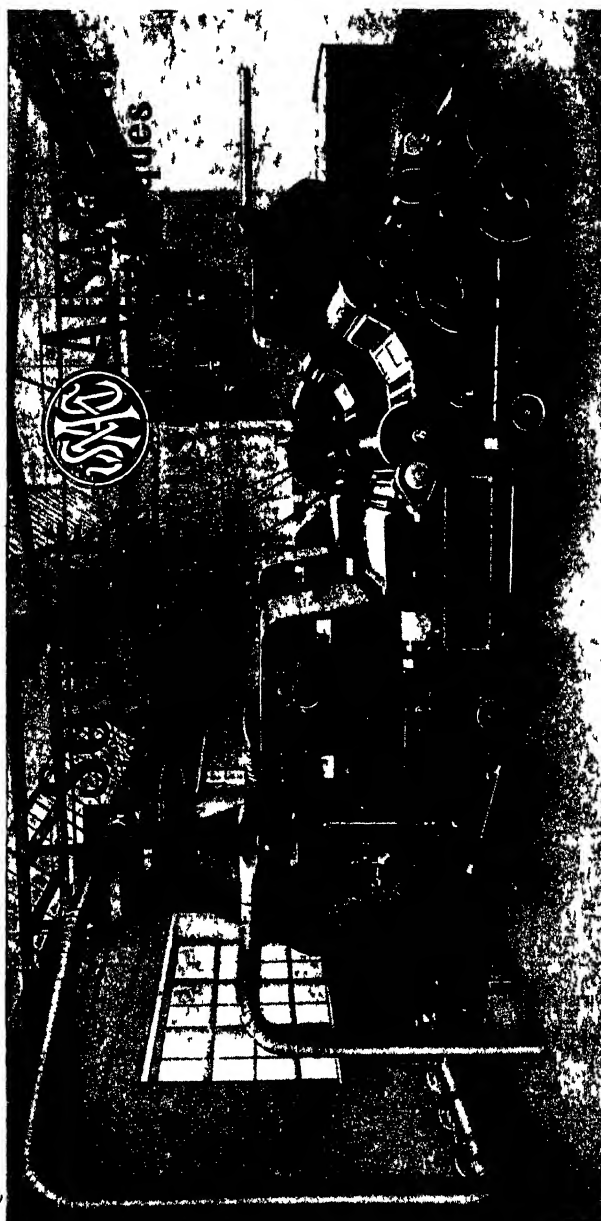
WRITE

on your business letterhead for a copy of our new brochure "Electro Pneumatic Lap Making," which deals exhaustively with modern Blowroom practice.

No better machinery goes into any mill.

PLATT Brothers & Co. Ltd.,
 Hartford Works, OLDHAM, Eng.

SOCIÉTÉ ALSACIENNE DE CONSTRUCTIONS MÉCANIQUES, MULHOUSE



"Single Process" Blowing-Room

COMPLETE EQUIPMENT OF TEXTILE MILLS

Cotton-Preparing, Spinning and Twisting Machines—Wool-Combing, Worsted-Spinning and Twisting Machines—Twisting Machines for Rayon—Weaving Machines for Cotton, Worsted and Silk—Printing, Dyeing, Bleaching, and Finishing Machines.



Schemes and Pacts in the English Cotton Trade.

THE following is taken from a recent issue of the *Manchester Guardian Commercial*.

Of all the stories told about the Lancashire cotton industry putting its house in order through various schemes of reorganization, the most impressive is that of the change in methods of selling in the yarn section. The change has been brought about by price agreements legally binding upon those firms which have signed them. Legalized price pacts are new; they are also, in their way, remarkable. The progress made during the last few months is surprising when considered alongside the efforts and failures encountered through the breaking of "gentlemen's agreements" during the last seven years. "Gentlemen's agreements" have been given a fair enough trial, and it is now admitted throughout the industry that the only certain way of gaining loyalty is by legalized price agreements carrying cash penalties for infringements.

Recently there came into operation a legalized price agreement in the Egyptian, Egyptian-type, fine American, and hosiery mule yarn section of the spinning trade. It has been signed and sealed by 81.19 per cent. of the spinners concerned and covers some 200 mills owning nearly 17,000,000 spindles. This is the first legally enforceable scheme to be put into force in this section and puts an end to price-cutting, consolidating a "gentlemen's agreement" which has been in operation for a few weeks.

Efforts to bring about such an agreement as this for the Egyptian section have been going on more or less continuously for about seven years, but for the development of the present scheme we need go back only as far as last July, when a recurrence of price-cutting caused increasing concern among firms affected. The sub-committee of the Federation of Master Cotton Spinners' Associations handling this section was called together to try to resolve a basis for general agreement. The same committee, as a matter of fact, had tackled the question twelve months earlier, but the resultant scheme put before the trade in November, 1935, gained insufficient support and could not be put into operation. In July, however, it was felt that there was such a spate of weak

selling—yarns sold at a loss, even regardless of advancing prices in raw cotton—that another effort should be made to secure stabilized prices. The fact that there had been unhappy experiences since the dropping of the previous scheme seemed likely to make general acceptance of a new plan more likely.

Several meetings were held, and eventually in September a mass meeting was held of spinners outside the Bolton area to consider proposals for linking them with Bolton spinners in a general agreement. Further meetings ensued of spinners in Bolton and other areas, and by November 13 there was a temporary agreement in force. Early in December copies of the scheme were sent out to all firms concerned. Later in the month the Drafting Committee announced that in the ballot 81.19 per cent. of the spindles had voted in favour, and only 12.67 per cent. against it. Now, with the scheme legally enforceable, efforts are still being made to bring into line those still outside. Obviously, if, say, another 10 per cent. could be persuaded to join, the small percentage of price-cutters remaining could have little influence on the market.

THE ROYTON AGREEMENT.

Until December last year there was in existence only one legalized price agreement in the trade—the Coarse Counts Agreement, commonly known as the Royton Agreement. This actually came into force in August, 1934, following several meetings of spinners. The new agreement was a big advance on all previous agreements (none legalized) in the Royton and other sections. The agreement was signed by 31 mills, controlling some 3,000,000 spindles; it covered all yarns of 26's counts and below of the ordinary American quality and was to remain in operation for 18 calendar months. A general committee and an executive committee were established, the former to fix minimum prices and conditions of sale. An independent accountant was appointed to scrutinize sales regularly, as well as after complaints. Complaints of breaches made direct to the accountant could be investigated by him and reported to the general committee, which would decide on the justification of the complaint. The executive committee could then assess damages. Maximum damages were specified in the agreement, and provision was made for a small levy to cover expenses. An arbitration board was also set up to consider questions of quality.

The Royton Agreement worked, and worked excellently. It was loyally kept and it had a beneficial effect on yarn prices outside its scope, because it was generally observed. Nevertheless, some competition was felt from firms not normally spinners of the counts covered, though on a small scale. This was an obvious pointer to the need for price pacts in other sections, to be inter-linked. In February last year the Coarse Counts Agreement was renewed, subject to certain conditions, for an indefinite period.

That renewal was, in effect, the signature of doom to weak selling in the spinning industry. Signatories to this agreement had proved beyond all doubt that a price scheme could be operated effectively and that increased margins could be maintained on a reasonable foundation.

Subsequent agreements have been concluded and have come

into effect with far less trouble than did the Royton in 1934. Then no one believed the scheme could be effective, and there was confidence that it would break down. For a time spinners met with consumer resistance—which itself eventually broke down.

MEDIUM AMERICAN YARNS.

There is now more general acquiescence in price agreements, and the Egyptian yarn scheme has been (comparatively speaking) easy to bring into being. The same applies broadly to the only other legally binding yarn price agreement yet in force, that for medium American mule yarns. Meetings began last May to consider margins, and in July firms in this section received an appeal for signature to a legal document covering yarns from 27's to 46's. In December it was announced that 50 out of the 53 firms in question had signed the agreement, which concerns some 5,000,000 spindles and will be binding for two years. The importance of this agreement is held to be that there are reciprocal clauses with the Coarse Counts Agreement and from the Coarse Counts Agreement to this, so that 16's and 42's yarn prices are now automatically governed in respect of 12,500,000 spindles. January saw further consolidation when spinners of 56's weft yarns decided that yarns from 47's to 56's should be governed by the Medium Counts Agreement.

In the ring yarn section a committee has been working for two and a half years to bring about an agreement for the whole of the ring spinners, and an agreement has already been signed by over 100 firms. Some still remain outside, and, while ring spinners are in a fairly happy position, due to the improvement in trade, it is essential that a majority should be obtained to make the agreement legal, in order that this section should be prepared for any falling off in business. It is essential also, naturally, for the good of the trade as a whole.

Another price maintenance scheme awaiting signatures to the legal document is that concerned with the plain doubling section, including counts up to 50's in twofold and threefold yarns. A special sub-committee of the Federation of Master Cotton Spinners' Associations is now preparing a scheme for other types of doubled yarns.

When all branches of the doubling section are covered by price maintenance schemes some 160 firms will be affected. So far even an approximate estimate of spindleage is not available. Doubling is done largely in the Stockport area and in Yorkshire, but it is also done in Bolton, Oldham, and other parts of Lancashire, in Scotland, and in Northern Ireland. The committee preparing price schemes was originally considering a plan for eliminating surplus capacity in the doubling industry, but the subject has now been dropped entirely.

The last few months have consequently seen all-round advances in yarn prices, partly due to stop-loss agreements, partly because of increased fuel costs, higher wages and the paying of levies under the Cotton Spinning Industry Act. This Act came into force last September, and a Spindles Board was established. So far the Spindles Board does not seem to have been particularly active in its appointed mission of reducing surplus spindleage, but improved

trade is one factor which is probably working against it. It is worth noting, for all that, that according to the board's official return the spinning industry as a whole during the six months ended September 14, 1936, was working at 77 per cent. of full time.

UNIFORM CLOTH COSTINGS.

Higher yarn prices, of course, have had their reaction on cloth prices. They have not been resented by the weaving trade. Rather have stabilized prices been welcomed. Stable cloth prices, while depending on stable yarn prices, have no doubt also been helped by the use of the uniform costings scheme for grey and coloured cloths, introduced last April by the Cotton Spinners' and Manufacturers' Association. This system gave a basis which can be followed with modifications even by those weaving mixture cloths.

So far solid achievement in reorganization has been recalled. There are now in prospect schemes of reorganization in three other sections of the trade—dyeing, printing and bleaching. Of the bleachers' scheme little is known, though this section of the finishing trade has had in being for some years a board which controls prices.

The calico printers' reorganization scheme will propose a pool and quota system, under which each firm will have a specific quota of production allotted to it, the basic figures being those for the years 1928 to 1934. A third of the machinery in the trade which is considered redundant, will be eliminated. A board of calico printers, possibly on similar lines to the Spindles Board, assisted by an advisory board of trade experts, will be given power to levy all firms on a basis of turnover. Sale of plant and buildings will be restricted, and export of redundant plant will be prohibited. The scheme will be put before the Board of Trade in the hope that it may be legalized by Act of Parliament, like the spinners' scheme.

FRANCE.

THE 40-HOUR WEEK IN THE TEXTILE INDUSTRY.

The following is taken from "Industrial and Labour Information," published by the International Labour Office, Geneva:—

The application of the Decree of November 17, 1936, relating to the introduction of the 40-hour week in the textile industries has given rise to a number of local arrangements.

The manufacturers and the textile workers' unions do not seem to have agreed as to the interpretation of the provisions of the Decree relating to the hour given over to the cleaning of spindles and looms. In some mills, the workers are required to work 41 hours a week, looms being cleaned only after the warp is terminated, that is, once every two or three weeks. In other mills cleaning operations are carried out at the same time for all workers. From a communication issued by the Textile Workers' Union of Roubaix, it appears that a 41st hour may be utilized for cleaning purposes, provided it is remunerated, and that the looms are stopped during such operations.

A large number of textile employers' organizations have asked to be allowed to take advantage of the postponement facilities accorded by the Decree of November 17, 1936. In this connection, a notice concerning the consultation of employers' and workers' organizations has been published. The workers' unions are definitely opposed to the authorization of any period of postponement.

Two Ministerial Orders issued on January 8, 1937, authorized a maximum working week of 46 hours for a period of three months in factories making net fabrics, gimp, lace and embroidery, and in mills making certain kinds of gauze.

Present Day Mill Conditions in Japan.

SO much discussion in these days centres upon the Japanese cotton industry that we think that the following account of present day mill conditions in Japan, written by the editor of the American journal, *Cotton*, from notes compiled by the secretary to the American cotton delegation which recently visited Japan, will be of interest to our readers. Much of the information contained in the following pages bears out what has previously been written by Mr. Arno S. Pearce, and published by the International Cotton Federation from time to time, but it is nevertheless important to keep these particulars up to date.

The Japanese industry follows the European, rather than the American pattern, in that to a large extent the spinning and weaving are conducted separately. This is not universal, and the trend seems to be toward the installation of weaving at the spinning plants, but on the whole, one of the mills we visited is typical; it has something over 99,000 spindles, and 850 looms; with two-thirds of the yarn being produced for sale as yarn. Another of the mills visited has nearly 140,000 spinning spindles, 32,000 twister spindles, and less than 800 looms, which results in about the same proportion.

Looking at the industry broadly for a moment, and considering only the cotton-textile branch, there were, in 1936, a total of 10,769,360 ring spinning spindles in Japan in mills belonging to the Japan Cotton Spinners' Association, which boasts membership of 98 per cent of the country's spindles. The membership includes 71 companies with 276 plants, and in addition to the spindleage given, these plants operate 92,416 looms. This figure represents approximately 30 per cent. of the looms in the country, but since the Association has practically all the spindles under its jurisdiction, it exercises automatically a production control over the remaining weaving equipment, most of which is organized under other associations. We were told that about 40 per cent. of the woven goods production of the country is carried out in units employing less than 10 persons each, situated in the agricultural

areas, but that none of this cloth is involved in the industry's export business.

The Cotton Spinners' Association exercises a complete control directly over the production schedules of its member mills, and since it embraces virtually all of the yarn capacity, controls indirectly the independent weaving units. At the present time all of the industry is operating under a curtailment programme of 25 per cent. of capacity, which has been in effect for several years, and is carried out through stoppage of equipment. The Association keeps records of the orders and stocks on hand monthly, and when the situation demands, issues an order for curtailment to the desired degree, which applies to all mills alike; and the Association's representatives go to each plant and seal up the required percentage of spinning equipment by removing the motive power and sealing the essential operating parts of the machine with a seal similar to the railroad car seals used in America. We were told that the curtailment applies against the total capacity of the plant, and the selection of the particular equipment to be stopped is left to the mill's option; that is, a plant with 75 per cent. of its spindles comparatively new, and the remainder obsolete, may effect the curtailment entirely on the old equipment.

Another interesting feature of the operation of the industry, in its programme of production control, is that a curtailment of $2\frac{1}{2}$ times the 25 per cent. programme, or $62\frac{1}{2}$ per cent. curtailment, is applied to any additional spindles installed during the period of curtailment. New spindles for replacement, however, are not affected.

Naturally, our first question was as to how such a strict programme of control could be exercised, for, after all, there must be "individualists" in Japan as in any other country. The explanation was quite simple. First, the Association made a contract with the steamship companies transporting Indian cotton (which back in those days constituted the larger percentage of Japanese raw material) not to deal with non-member mills; second, a similar arrangement was made with some dealers of cotton in Japan; and, third, a contract with the yarn sales organizations was made on a similar basis, so that while membership in the organization is not mandatory by law, a non-conforming non-member would soon find himself without a source of raw material, and without a market for his product.

Another striking feature of the industry's composition is the fact that a very large percentage of its spindles are operated by a few large companies. Out of a total of about 11,000,000 spindles for the country as a whole, one of the large and progressive companies, the Kanegafuchi Spinning Co. Ltd., whose president, Mr. S. Tsuda, the members of our committee met, operates in Japan a total of 965,864 cotton spinning spindles; the Toyo Boseki (Toyo Cotton Mills Co. Ltd.), whose president, Mr. O. Shoji, was the chairman of the committee dealing with our mission, and who is president of the Japan Cotton Spinners' Association, operates 1,476,096 spindles; the Dai Nippon Boseki two of whose mills we visited, operated over 920,000 spindles in Japan. These figures do not include relatively large operations by some of these companies in China. Fuji Gasu, another large group with 10 mills, has a

total of 664,944 spindles. So it is seen that these four concerns control about 40 per cent. of the spindles of the country; and there are several others whose total spindles runs up between 400,000 and 500,000.

The Association exercises no major jurisdiction over the member mills, other than that of production control. Matters of wage rates, work assignments, sale prices and policies, etc., are left to the jurisdiction of the private companies, but in these and other matters there appeared to be a close uniformity among the mills visited, and we were told that this prevails generally throughout the industry.

Hours of work for operatives are fairly uniform. A national law prohibits the employment of women after 11 p.m., and the Factory Law limits the hours per day to 8½ hours. Practically all of the spinning mills operate on two shifts, the first from 5 a.m. to 2 p.m., and the second from 2 p.m. to 11 p.m., with a half-hour recess for meals on each shift. The mills operate on Sundays, but two rest days per month are required, and four are generally given.

Perhaps the most striking feature of the Japanese mills that impressed our party was the composition of the labour force; in every mill visited at least 80 per cent. of the labour force is female, largely girls between 14 and 17 years of age. We were told this situation prevails generally, and this is confirmed by the official figures of the Spinners' Association, which show for 1936 a total of 150,148 employees in its member mills, of which 132,246 are female, which figures about 88 per cent. female for the industry as a whole. One mill we visited, with about 140,000 spindles and about 800 looms, employs 2,300 females and 150 males, the men being used entirely in supervisory and mechanical work. It was most revealing for us to walk, even hurriedly, through a mill of this size without seeing any male employees except in such positions corresponding to our section men and loom fixers: and was rather startling to see Japanese girls operating opening machinery, pickers, and slashers.

Invariably, the Japanese mill and its properties are surrounded by a wall which embraces the mill compound, and the girls are housed in large dormitories, which are provided free of cost by the mill. These dormitories are the equivalent of our mill villages, and are designed to meet the preponderance of unmarried female employees. They are located, as stated, within the mill compound, usually connected with the mill buildings by covered passageways, and in the newer mills these passageways are enclosed with side glass. The only means of heat in these dormitories are braziers, stone crocks filled with sand, in which charcoal sticks are burned. These braziers are located in the corridors, outside the girls' rooms. This was the universal "heating system" we encountered in orthodox Japanese restaurants, tea houses and homes.

The girls live in groups, usually about eight or ten to the single room, which, when not in use, is totally devoid of furniture except for the ever-present straw matting on the floor. Each girl has a series of cabinets enclosed by sliding doors in the side walls, in one section of which she keeps her bedding (a mattress, sheets, etc.); in another her clothing, in another her personal effects, etc.

There are large bathrooms and toilets on each floor (the dormitories usually being two and three storey) and each floor or section is in charge of a matron. All of the girls eat in a large dining-room, and each dormitory is equipped with a canteen, operated either by the mill company or under lease by outside interests; a hair-dressing parlour; an assembly hall and schoolrooms. It is general practice to have also first-aid rooms and hospitals, the services of which are available free of charge.

The girls are required to attend school for two hours a day, under competent instructors furnished by the mill, and are taught language (usually Japanese and English), history, mathematics, and the popular flower arrangements and tea ceremony. Religious services are held regularly. The girls are not confined to the dormitories in their free time, but the first-shift workers must be back in the compound before 8 p.m.

Although practically all of the female personnel is composed of single girls, there are at all of the mills married women and their husbands, in small number. These live in houses furnished by the mill, and the few single men live in separate dormitories, all usually within the mill compound wall.

No detailed figures as to wages were available, but it was authentically stated that the average wage for the girls in Japanese mills is 80 sen per day. A yen, at the time of our visit, was equivalent to about 28½ cents American money, and there are 100 sen in a yen, which means that the average wage is about 22 or 23 cents a day. Meals are furnished at a total cost of about 15 sen a day, representing a little more than half of the cost of the meals to the mill.

We learned from friends both within and out of the industry itself that the moral and spiritual standards among the girls in the mills is very high. We ourselves were greatly interested to find that in our own brief observations they appeared at work and in their dormitories to be a fully contented, healthy group, eager and enthusiastic in their work.

Our party was shown first, the newest mill in Japan; it was built about two years ago, and all of the machinery had not been erected. Trying to get as complete a cross-section as possible within our limited time, we asked to see some older mills, and of the three others I visited, one had been in operation for about 30 years, and the other two were from 15 to 20 years old. Working against the obstacles of time and language difficulty, we were able to get a few details, but one fact was predominant, and that was that as rapidly as possible, Japan is equipping her mills with machinery of Japanese make. The brand-new mill which we saw first was completely equipped, from cotton warehouse to cloth room, with productive and auxiliary machinery, and other equipment, made in Japan. The older mills were originally equipped with English machinery—largely Platt's, and some Howard & Bullough—but all replacements, etc., were of Japanese manufacture.

We did not see any producing machinery of American make. The Japanese high draft (long draft) spinning which we inspected follows the pattern of the English principle, with a large heavy steel roll on the back, and an adaptation of the two-belt principle.

We saw no improved drafting on roving frames nor drawing. The Toyoda looms (shuttle changing) appeared to be running efficiently, and as a whole spindle speeds and drafts on spinning were relatively high, and the use of variable-speed motors on spinning seemed fairly general.

But in no mill did we see automatic spooling and high-speed warping of the Barber-Colman type. Two of the mills visited use the old style spooler and slow-speed warper; and the other two wind the warp bobbins on to wooden cones for use in magazine creels feeding to what were plainly marked "High Speed Warpers," but which under our observation did not in any way approach the speeds attained by comparable equipment in our country.

We found the job assignment surprisingly low, as will be seen from the following comments on some of the features of the four mills visited. We found a number of interesting and ingenious devices, some of which undoubtedly resulted from the use of girls on all jobs in the mill. But, while freely admitting the incompleteness of our study, we came away without having seen any evidences of any outstandingly superior efficiency.

There was no one-process or single-process picking in any of the mills we visited, mostly two-process. An ingenious arrangement used in all four mills was an elevating mechanism which carried the fresh supply of laps up to a rack located above the apron of the finisher picker, making it unnecessary for the operative to lift the lap other than to move it from the truck to the conveyor chain which conveyed the laps into place above the apron; then when the apron was to be filled the fresh laps were simply lowered into place on the apron.

Another interesting device, used in three of the mills, was a platform at the front of the picker, on to which the lap was rolled when doffing the machine. This platform, which swung away from the picker at one end, had on top of it a curved tray into which the lap rolled and which represented the beam of a scale, so that the lap was removed from the picker and weighed at the same time, and from this platform the lap was put on to a truck or conveyor for movement into the card room. The other mill used the same principle, except that instead of having one of these racks at the front of each picker, they had one platform for a line of five pickers, it moving from one to the other on a track.

The pickers in the brand-new mill have no cone belts, the evenner motion changing the speed of the feed through an electrical mechanism instead of belts. The other mills used English type pickers with vertical cones.

This same new mill has about 800 Toyoda (Japanese) high-speed shuttle-changing looms, all individual drive. The one we counted was running approximately 210 p.p.m. on a 36-in. fabric. This mill warps from cones, but at very slow speed. Japanese-make long draft spinning was running making 100's from single roving, with a draft of 33, a spindle speed of 12,000 r.p.m. and a front roll speed of 88 r.p.m., 1½-in. ring, 2½-in. gauge. The work assignment is 700 spindles per operative.

The next mill visited was an old plant, kept very well up-to-date. Most of the machinery was English, largely Platt's. The

mill uses $\frac{7}{8}$ to 1-in. American cotton, making 30's warp and 35's filling; Platt opening equipment (1916); English spinning changed over to Japanese long draft and variable-speed motor drive; slow speed warpers and old style H. & B. spoolers (1913). They have a varied assortment of looms, using steel harness and four-bank stop motion on bobbin change looms with four-frame drive. On a 61 x 60, 40-ins. fabric, the girls run 25 looms each, doing their own battery filling. This mill opens up to 12 bales of cotton at a time.

The third mill is about 30 years old, but its mechanical equipment has been maintained in excellent condition. It has a total, in four units, of 122,000 spindles, and 780 looms, some of which are English plain over-pick type. It makes 30's to 150's, and has 2,610 employees, of which 2,370 are female. It has a men's dormitory of 32 rooms, with a capacity of 256; and a girls' dormitory of 136 rooms, with a capacity for 2,100. It operates a three-year school course and also a one-year special course. Food is served at a charge of 18 sen a day for male employees, and 14 sen a day for female workers.

On 100's yarn, this mill has a spindle speed of 10,000 r.p.m., with a front roll surface speed of approximately 600 ins. per minute (that is the way the chief engineer, corresponding to our superintendent, gave it to me.) They have a draft of 30, with single roving, using $1\frac{1}{4}$ to $1\frac{3}{4}$ -in. cotton. The work assignment is 500 spindles per operative. On 30's, they reported a spindle speed of 12,000 r.p.m., on a $1\frac{5}{8}$ -in. ring, 20 turns of twist per inch. The work assignment is 400 to 600 spindles to the operative.

The fourth mill is an old plant, with 99,832 spinning spindles, 44,462 twister spindles, and 850 Toyoda shuttle-changing looms. Two-thirds of the yarn is made for sale, with 40's and 46's being produced for consumption.

The card room here has 223 cards, some Platt Model 1909, others Toyoda with individual drive. In this room there are 12 girl card hands, one male supervisor and 11 repairers. The doffer runs 10.2 r.p.m., and the cylinder 170 r.p.m. Three processes of drawing are used, with a front roll speed of 380 r.p.m., with a $1\frac{3}{8}$ -in. roll.

The spinning is tape drive, long draft, with a spindle speed of 13,028 r.p.m., on 40's warp, roll speed of 180 r.p.m. for a $\frac{7}{8}$ -in. front roll. The regular job assignment is 420 spindles to the girl, with 630 spindles as the maximum job.

The Toyoda looms, 44-in. reed space, run 175 p.p.m. With a total of 850 looms, there are 90 weavers and 20 helpers in the room (undoubtedly for both shifts). Beginner weavers handle 15 looms, and the maximum number to the girl is 30 looms.

All of the Japanese mills that we saw—and we were told it is generally true—are of one-storey height, usually of concrete and brick construction. In all of the four mills, the looms are set on concrete blocks. Steam coil heating is used in three of them, the new one being equipped with unit heaters. One mill puts its bobbins of yarn in canvas bags with handles for carrying instead of putting the bobbins directly into trucks. We saw a large number of trucks equipped with rubber-tyred wheels or casters. The floors of all of the mills were in good condition, and even the coarse

goods mills were marvels of cleanliness and the absence of fly and lint was noticeable. In one mill the slashers are equipped with individual motor drive. All of the mills use slasher hoods made of cherry wood, and one mill has its slashers equipped with the type of immersion roll consisting of a series of small bars, which has recently been brought out in the United States. We did not see any cans or bobbins which would be considered in America as large packages. One girl doffer we noticed laying the empty bobbins on the roller beam down the entire length of the frame before starting to doff. All of the machinery is of less height than ours, on account of the short stature of the Japanese girls. We saw no high duty type humidifier heads, only ducts or atomizer type.

U.S.A.

The following extract is taken from a report on Economic and Commercial Conditions in U.S.A., by the Commercial Counsellor to H.M. Embassy in Washington. The report is dated December, 1936. Published for the Department of Overseas Trade by H.M. Stationery Office, London. Price 3s. net.

The U.S. cotton textile industry suffered a disappointing year in 1935, and was slower than most in reaping the benefits of the general business revival. After the abrogation of the N.R.A. Codes in May of that year the industry continued by mutual agreement to adhere to most of the Code provisions in an effort to avoid intensified competition, but the processing tax levied upon raw cotton under the A.A.A. maintained costs of production at a relatively high level until it was declared unconstitutional in January, 1936, since many mills were unable to pass on the tax to the consumer. Demand increased from both retail and industrial sources throughout the summer of 1936, until production in August was 51 per cent. better than in the corresponding month of 1935, and spindle activity had increased by 43 per cent. In certain lines, notably in print cloth, the demand far exceeded the rate of production, which is now higher than at any time since 1927, and many mills were operating three shifts in an effort to keep pace with orders. Spindles in place at the end of June, 1936, totalled 28,311,834, of which 23,124,380 were active. Over a million spindles were scrapped during the first six months of 1936, yet during the same period active spindle hours increased by 14 per cent. as compared with 1935. The total reduction in looms is not so large, since an increasing number of mills are turning to the production of rayon. The future outlook of the industry, although considerably brighter than at the end of 1935, is not yet entirely unclouded. The new industrial uses which are being found for cotton are partly compensating its progressive displacement by rayon for women's wear. An increasing outlet is in fabric coverings and tyres for the automobile trade, which in 1935 took 10 per cent. of the total cotton consumed in the United States. Cotton fabric is also being used to reinforce bituminous roads, and experimental surfaces of this type laid during 1936 totalled over 400 miles. Yet despite the continued reduction in equipment, the

capacity of the industry is still too great for its market except in boom times, and the foreign market has been drastically diminished owing to the general restriction of international trade and strong Japanese competition. The effect of Japanese imports in the domestic market is considered by many manufacturers as the most serious problem at present facing the industry. Although they amount to only 2 per cent. of total annual domestic consumption, Japan has captured over 40 per cent. of the domestic market in bleached goods, velveteens, table covers and cotton hosiery, and is causing serious dislocation in these sections of the trade, since cotton mills cannot easily meet competition by changing the class of fabric manufactured. Total imports of cotton goods from Japan increased from 36½ million square yards in 1935 to nearly 50 million square yards during the first seven months of 1936. In bleached cotton cloth, of which the annual consumption is estimated at 150 million square yards, importations from Japan rose from 30 million square yards in 1935 to 40 million in the first seven months of 1936.

Largely as a result of complaints from textile manufacturers, the duty on countable cotton cloths was raised by 42 per cent. in June, 1936. Imports from Japan have since decreased, but are still appreciable. The tariff increase is considered by manufacturers as wholly inadequate to protect the domestic market, and representations have been made to the United States Tariff Commission that, owing to the great difference between costs of production in the two countries, an *ad valorem* duty based upon the American selling price should be substituted for the present valuation upon home market prices.

The Textile Agreement between the U.S.A. and Japan.

THE full text of the textile agreement reached at Osaka on January 22 between the American Textile Mission and representatives of the Japanese cotton textile industry is as follows:—

The American Textile Mission and the representatives of the Japanese cotton textile industry understand the following to be a correct statement of the principles and procedures mutually approved by them in their conferences of January 15 to 22, 1937, inclusive.

(A.) PIECE GOODS.

1. The Japanese representatives accept quota limitation as the most practicable means of arriving at a satisfactory arrangement with respect to their textile exports to continental United States.

2. On cotton piece goods a quantity limitation shall at once be made applicable as of January 1, 1937. The basic quotas applicable to the years 1937 and 1938 are as follows: For the year 1937

the basic quota shall be 155 million square yards or the volume of contracts on hand on January 21, 1937, for Japanese piece goods for shipment to the United States in 1937, whichever amount is the smaller. For the year 1938, the basic quota shall be 100 million square yards subject to the following proviso: The Japanese industry is privileged to transfer not more than one-fourth (25,000,000 square yards) of the 1938 apportionment to the 1937 quota, but the 1938 shipments must be diminished below the basic quota by such amount as the 1937 shipments are increased above the latter year's basic quota.

This agreement may be expressed otherwise as follows: The quotas agreed upon for the two-year period constitute a maximum of 255 million square yards. Of this amount the 1937 apportionment shall not exceed 180 million square yards, or be less than 155 million square yards or the volume of orders on hand on January 21, 1937, for shipment to the United States in 1937, whichever is the smaller figure.

3. In the measurements requisite to the enforcement of these quota arrangements, the official data of export shipments as compiled by the Japanese Government shall be used. The procedure followed shall be similar to that used in the administration of the quota arrangement on cotton rugs now in effect between the two Governments.

The entire responsibility for the attainment of the objectives sought in this quota arrangement shall be lodged with the Japanese industry or its authorized agencies, and the obligation to accomplish these objectives is regarded by the American industry as predicated on considerations of good faith rather than on those of contractual and technical character.

4. For the purpose of satisfying these quota arrangements, cotton piece goods shall be regarded as inclusive of all woven piece goods, the principal material of which is cotton.

5. The arrangements provided for above shall not in any way include existing agreements on cotton goods between the two industries or between the two Governments.

6. Should the trans-shipments of goods of Japanese origin from third countries to the United States tend to render ineffectual the purposes of these quota arrangements, the Japanese industry agrees to subtract the amount of such trans-shipments as compiled by the United States Customs Service from the volume of direct shipments from Japan to the United States. The American Commission will undertake to reduce the volume of trans-shipments in two ways: (1) to transmit to the Japanese industry monthly the amount of such trans-shipments together with the names of the importers and exporters involved, and the ports of trans-shipment; (2) by undertaking to secure the co-operation of the Association of Cotton Textile Merchants of New York, as well as similar associations in other cities, in preventing their members from purchasing textile goods shipments originating in Japan which are not imported directly from Japan.

7. For the purposes of the calculations on piece goods, any quantities which have been imported into the United States and then re-exported shall be excluded.

(B.) JOINT COMMITTEE.

1. The two industries will undertake to establish as soon as practicable and not later than April 1, 1937, a joint committee consisting of an equal number of representatives of each industry. The purposes of this joint committee shall be to deal with whatever administrative difficulties may arise in connection with existing quota arrangements, and also to act as a negotiating committee in the establishment of subsequent arrangements between the two industries relative to quantity limitations or other means of control.

(C.) MISCELLANEOUS SPECIALTIES AND OTHER PRODUCTS FOR CONSUMPTION MADE OF COTTON.

1. The Japanese accept the principle of quota limitation as regards tablecloths, bedspreads, handkerchiefs, cotton gloves, underwear and other specialty items manufactured from cotton cloth, and yarns or thread.

2. They will undertake to institute negotiations in line with the above principle through the joint committee as above provided for or through the agencies of the two Governments, whichever may be agreed upon as more practicable.

3. It is agreed that after the formation of the joint committee every effort consistent with good faith and with a mutual desire for a solution of the trade problems of the two industries will be made to effect appropriate quota arrangements relative to the above classifications prior to June 30, 1937, or as soon thereafter as is practicable.

(D). The representatives of the American industry regard the application of the above principles and procedures to the textile trade of the two countries as rendering unnecessary any action on the part of the United States Government looking toward further restriction of Japanese cotton textile imports. They also consider that the application of these measures will serve to lay the groundwork for a reciprocal trade treaty between the Governments of the two countries and thus make possible tariff adjustments which will be of mutual advantage to the two countries.

(E.) This arrangement shall be regarded as being in immediate effect, but subject to repudiation by the Japanese industry by cablegram from Japan on or before February 15, 1937.

The American Journal "Cotton," commenting upon the agreement states as follows:—

The ultimate significance of the successful negotiations of the volutary quota limitation by the Japanese textile industry of their cotton-textile exports to the United States transcends the particular industry immediately affected. In its conception and effectuation, it represents a new and constructive step in international trade relations.

The understanding brings to the American cotton-textile industry unquestionable benefits of an immediate and tangible nature. There has been growing in the American industry during the past three years, a state of uncertainty and instability, as the imports of Japanese textiles into America increased at such a rapid rate as to threaten the American industry itself. The establish-

ment of the voluntary quota for 1937 and 1938 definitely fixes the amount at a figure which removes a major dark cloud of uncertainty and threat and eliminates the potential damage to the American mills. The very fact that the amount is fixed is more essential to this point than the figure at which it was set. The arrangement also dissipates fear and uncertainty in forward purchases of American textiles which hung over the market, ominously and in markedly increasing degree, as the threat of increasing Japanese imports gained such startling momentum and force.

It will serve, furthermore as an altogether heartening and constructive influence in the preservation of America's internal programme of economic improvement and in the maintenance of the textile industry's higher standards, by removing the threat to that structure which came in the increasing flood-tide of imports from the outstanding low-cost nation into the highest-cost nation of the world.

And to the Japanese industry there are advantages not immediately apparent in the light of the benefits to the American industry itself. The understanding is one which should prove to be, not one-sided in the American favour, but mutually profitable and beneficial, as all true understandings should be. The wisdom of the Japanese representatives in meeting the recommendations of the American mission makes unnecessary, under the proper execution of the arrangement, the application of restrictive and discriminatory measures against Japanese goods, a sometimes necessary though unpleasant action that invariably brings retaliation and abuse. A very concrete result of definitely fixing a "ceiling" to the amount will be an improvement in the sale price of Japanese goods in this country, and hence a better net profit for Japanese mills. It will also mean that the better type of distributors in the United States, relieved now of the fear of discrimination and criticism applicable to uncontrolled distribution of Japanese fabrics, will be more readily receptive to handling these goods, and will replace in degree the unsatisfactory, undignified selling of Japanese products by the adventurous, fly-by-night distributor, who has been a major element in Japanese representation.

But much broader in importance, significance and permanent value is the wholesome effect of this understanding upon the whole subject of relationships—trade, social and political—between these two great nations of the West and the East. This voluntary understanding, negotiated entirely between the industries themselves, the acceptance by the Japanese of the principle of quota limitation on textile specialties such as bedspreads, table-cloths, etc.—products made from piece goods—sets the pace for similarly amicable and mutually profitable settlement of difficulties in many other industrial and commercial fields. Achieved in the face of scepticism which prevailed generally in both countries, executed in an atmosphere of friendly understanding and good will, without a tinge of acrimony or bitterness, it is at once a tribute to the doctrine of good will and wise industrial statesmanship, a solution of a difficult common problem, and a contribution to international trade relationships, harmony and concord.

U.S.S.R.

We understand from the *Monthly Review of the U.S.S.R. Trade Delegation in Great Britain* that the cotton industry of the U.S.S.R. is to exceed last year's output by 23 per cent. The output of fine fabrics is to increase by 25 per cent., while high-grade fabrics from twisted thread will increase by 35 per cent. Some 3,000 new patterns of cotton cloth are to be produced during the course of this year, and 70 per cent. of the cotton goods will be dyed with fast colours.

The 1937 plan for the national economy of the Soviet Union provides that 450,000 new spindles shall be installed in the cotton spinning mills; 200,000 of these will be installed in space available in existing cotton mills. The construction of the second sections of the Tashkent and Barnaul cotton combines is to be proceeded with, as well as the construction of spinning mills for the Novosibirsk and Tbilisi (Tiflis) knitgoods combines. The Smolensk and Orsha linen combines are to be completed and put into operation, and building is to be developed of the linen combines of Vologda, Bezhitsa, Glazov, and Vyazma. In woollen textiles, the Kiev combine for the manufacture of fine cloth, and the cloth combine at Semipalatinsk will be built this year, also the Lancucki worsted combine.

(*Manchester Guardian*.)

WAGES AND WORKING HOURS IN THE BRITISH TEXTILE INDUSTRIES (OCTOBER, 1935).

In October, 1935, an enquiry was instituted by the Ministry of Labour into the average weekly earnings and weekly hours of labour of workpeople employed in manufacturing industries. The results are given by the Ministry of Labour in the *Gazette*, February, 1937, and are shown on the following pages:—

Employers were asked to include in their returns the whole of the wage-earners (other than those working at home on material supplied by the employer), but to exclude managers, clerks, typists, commercial travellers and salaried persons generally. Foremen, carters, warehousemen, etc., were to be included in the returns.

There have been increases of over 5½ per cent. for most of the workers in the cotton-spinning industry with additional increases for some of the lower-paid operatives, of 10 per cent. for the great majority of those in the woollen and worsted industry, of about 5 per cent. for workers employed in bleaching, dyeing, printing and finishing, of 4½ per cent. for jute workers, and of various amounts for flax preparers and spinners in Northern Ireland. There are prospective increases of 7½ per cent. and upwards for cotton and rayon weaving. In rayon spinning, 8,731 workers were on day work at 47.7 hours per week and 11,129 workers on shift work at 44.3 hours per week, average.

I—AVERAGE EARNINGS IN THE WEEK ENDED 12th OCTOBER, 1935.

INDUSTRY	Total No. of work people covered by returns	Workpeople covered by returns giving separate details by sex and age														
		Average weekly earnings of all work people covered by returns			Men (21 years and over) No. Average weekly earnings by returns			Youths and Boys (under 21 years) No. Average weekly earnings by returns			Women (18 years and over) No. Average weekly earnings by returns			Girls (under 18 years) No. Average weekly earnings by returns		
		s	d		s	d		s	d		s	d		s	d	
Textile Industries																
Cotton carding, spinning and doubling (including thread manufacture*)	148,119	32 6			27,214	49 6		6,985	18 7		48,241	27 6		10,594	16 7	
Cotton weaving	111,938	35 0			15,366	49 10		1,767	19 9		30,738	30 8		3,839	16 7	
Cotton spinning and weaving (not separately distinguished)	3,002	33 0			7,178	49 4		1,144	20 3		14,640	28 6		2,597	15 8	
Cotton wool, surgical dressings*, engine waste, etc., manufacture	6,820	32 11			983	39 1		137	23 6		1,981	28 6		715	17 3	
Total, Cotton	322,879	33 8			50,741	49 9		9,733	19 1		95,000	28 8		17,745	16 6	
Wool sorting, carbonizing and scouring	1,430	50 7			898	58 6		96	21 6		93	26 11		19	16 10	
Wool combing and top making	12,302	44 3			6,843	53 6		544	27 9		3,128	28 1		249	22 1	
Worsted spinning and weaving	79,160	33 9			11,640	55 8		4,451	21 8		31,509	30 6		6,853	20 4	
Woolen spinning and weaving	69,177	41 0			17,216	55 0		2,679	22 2		17,672	33 2		3,091	20 2	
Woolen and worsted (not separately distinguished)	2,710	39 11			5,897	57 11		1,204	23 0		8,581	32 0		1,583	19 0	
Mungo, shoddy and flock manufacture, rag grinding and carbonizing	3,489	39 3			1,822	51 7		106	24 8		970	25 2		280	15 9	
Total, Woollen and Worsted	191,268	38 2			41,316	55 3		9,140	22 5		61,953	31 3		12,075	20 1	
Artificial silk spinning	20,741	46 3			8,159	67 3		1,864	39 11		4,910	29 9		1,591	17 10	
Silk throwing, spinning and weaving (including artificial silk weaving)	43,889	42 7			15,158	66 10		2,781	30 8		14,088	31 1		4,468	17 11	
Jute and hemp spinning and weaving	20,809	37 0			7,432	48 10		2,623	18 1		20,779	32 6		6,041	14 11	
Asbestos manufacture	6,040	47 2			3,010	61 3		1,216	27 9		1,204	32 5		1,715	17 11	
Hair curling, spinning and weaving	1,595	35 10			574	53 4		135	24 4		1,465	26 7		173	15 11	
Preparing, spinning and weaving of other or mixed fibres	1,280	38 3			546	49 7		202	22 2		217	27 9		81	15 4	
Hosiery manufacture	95,930	37 10			10,068	72 3		2,543	26 1		38,705	35 8		12,878	17 6	
Lace manufacture	8,971	43 3			3,102	64 11		490	21 11		2,988	31 9		578	15 11	
Carpet and rug manufacture	22,143	37 11			4,236	61 10		1,444	20 8		5,302	36 9		1,911	17 10	
Rope, cord and twine manufacture	12,077	29 2			1,741	53 8		793	18 1		3,559	27 3		1,626	15 11	
Tapes and smallwares manufacture	6,942	29 11			648	61 6		201	17 3		2,483	29 10		941	15 2	
Elastic web manufacture	4,197	32 7			830	56 8		237	20 5		1,661	30 3		587	15 8	
Canvas goods (tents, tarpaulins, etc.) manufacture	6,735	32 6			1,585	56 0		331	22 6		2,649	28 10		1,414	16 1	
Hennuming and embroidery	5,190	28 9			254	54 6		98	21 5		3,234	28 6		1,083	14 10	
Making of other textile goods (not dress)*	5,243	28 8			341	56 9		84	17 5		2,937	31 0		1,148	15 0	
Textile bleaching, printing, dyeing and finishing	78,859	44 6			43,839	55 6		7,762	24 2		12,340	27 10		3,756	16 10	
Velvet and fustian cutting	880	34 3			2,389	59 0		365	18 3		180	27 0		616	13 4	
Making up and packing	6,021	35 3			2,195	54 2		382	21 9		2,222	27 1		1,663	16 9	
Miscellaneous textile (including combinations of above)	11,566	32 9			1,977	55 2					4,014	29 9		1,663	16 9	
Total, Textiles	923,674	36 4			206,385	55 11		44,022	23 1		290,985	30 3		72,354	17 2	

* Including the making (from textile materials) of articles such as easement curtains, cushion covers, pillow cases, table-cloths, &c., &c.

II—HOURS OF LABOUR IN THE WEEK ENDED 12th OCTOBER, 1935.

INDUSTRY		No. of workpeople covered by returns received	Average normal weekly hours	Proportions of workers on short time Per cent.	Average hours lost by those workers	Proportions working more than the normal Per cent.	Average hours worked by those workers in excess of the normal week	Average hours worked by all workers
Textile Industries :—								
Cotton carding, spinning and doubling	..	147,783	48-0	10-3	13-8	5-5	6-6	47-0
Cotton weaving	..	111,489	47-9	3-5	13-7	3-4	6-7	47-6
Cotton spinning and weaving (not separately distinguished)	..	55,778	48-0	9-8	11-8	4-7	7-3	47-2
Cotton wool, surgical dressings, engine waste, etc.	..	6,467	47-2	5-7	14-4	12-9	8-4	47-4
Total, Cotton	..	321,537	48-0	7-7	13-4	4-8	6-8	47-3
Wool sorting, carbonizing and scouring	..	1,342	48-0	11-5	9-7	27-7	4-2	48-1
Wool combing and top making	..	12,073	47-9	17-4	17-2	24-9	7-7	46-8
Worsted spinning and weaving	..	78,536	48-1	6-4	11-3	34-9	7-8	46-4
Woolen spinning and weaving	..	67,788	48-1	10-5	9-8	32-2	7-0	49-3
Woolen and worsted (not separately distinguished)	..	25,704	47-9	13-6	7-9	40-0	6-4	49-3
Mungo, shoddy and flock manufacture, rag grinding and carbonizing	..	3,297	47-6	20-6	7-3	18-9	9-5	47-9
Total, Woolen and Worsted	..	183,750	48-0	9-9	10-6	33-7	6-4	49-2
Artificial silk spinning	..	19,873	45-8	2-3	12-6	8-4	6-3	46-0
Silk throwing, spinning and weaving (including artificial silk weaving)	..	43,011	49-9	8-9	10-0	15-4	6-0	46-9
Flax and hemp spinning and weaving	..	49,653	47-6	23-7	7-0	6-3	4-5	48-1
Jute spinning and weaving	..	20,906	48-0	4-2	10-9	13-0	4-6	48-1
Asbestos manufacture	..	6,040	47-0	6-6	10-2	30-6	6-5	48-3
Hair curling, spinning and weaving	..	1,536	47-1	21-9	7-9	18-0	6-4	47-8
Preparing, spinning and weaving of other fibres	..	1,244	47-6	6-4	7-5	10-7	6-4	47-8
Hosiery manufacture	..	93,814	48-0	11-0	9-5	25-1	5-0	48-1
Lace manufacture	..	8,489	48-1	16-3	12-2	11-8	7-0	46-5
Carpet and rug manufacture	..	22,143	48-0	4-2	8-9	6-2	7-2	48-3
Rope, cord and twine manufacture	..	11,954	47-2	9-1	8-0	18-3	5-9	47-5
Tape and smallwares manufacture	..	6,942	47-1	18-3	9-4	18-2	4-2	47-3
Elastic web manufacture	..	4,197	48-1	10-0	9-0	23-1	6-0	47-4
Canvas goods (bents, tarpaulins, etc.) manufacture	..	6,578	46-8	10-0	8-2	19-9	5-5	45-4
Hemming and embroidery	..	4,825	45-2	13-8	12-9	31-2	9-3	47-7
Making of other textile goods (not dress)	..	5,052	46-5	13-8	12-9	33-2	8-1	47-4
Textile bleaching, printing, dyeing and finishing	..	77,878	48-3	20-3	12-9	38-2	7-0	48-8
Velvet and tustian cutting	..	580	47-8	17-9	9-2	17-9	5-6	44-5
Making-up and packing	..	5,994	46-6	25-2	11-2	13-6	7-2	47-3
Miscellaneous (including combinations of above)	..	11,368	47-3	11-3	9-5	14-9	6-5	47-7
Total, Textiles	..	911,364	47-8	11-5	11-1	17-1	6-5	47-7

CURRENT INFORMATION REGARDING TARIFF AND QUOTA CHANGES.

COTTON AND RAYON PIECE GOODS.

INDIA.

The following duty increases on the main categories of non-British rayon and rayon mixture piece goods entering India came into effect on April 1. In all cases the higher yielding duty is payable:—

	New Duty	Former Duty
Fabrics, not elsewhere specified, containing more than 90 per cent. of rayon.	50 per cent. <i>ad val.</i> or 5 annas per square yard.	50 per cent. <i>ad val.</i> or 4 annas per square yard.
Fabrics, n.e.s., containing not more than 10 per cent. silk, but more than 10 per cent. and not more than 90 per cent rayon.	50 per cent. <i>ad val.</i> or 4 annas per square yard.	50 per cent. <i>ad val.</i> or 3½ annas per square yard.
Containing 50 per cent. or more of cotton.		
Containing no cotton or less than 50 per cent. cotton.	50 per cent. <i>ad val.</i> or 5 annas per square yard.	50 per cent. <i>ad val.</i> or 4 annas per square yard.

SYRIA AND LEBANON.

The following slight reductions have been made in the duties on certain bleached, piece-dyed, and yarn-dyed cotton piece goods entering Syria and Lebanon:—

Cotton Tissues not figured Weighing per square metre.	New Duty Piastres per kilog. net	Former Duty
Bleached :		
Up to 50 grs.	24·10	24·15
51 to 100 grs.	19·50	19·55
101 to 150 grs.	17·20	17·25
Over 150 grs.	14·90	14·95
Dyed in the piece or yarn-dyed :		
Up to 50 grs.	35·60	35·65
51 to 100 grs.	28·70	28·75
101 to 150 grs.	31·00	31·05
Over 150 grs.	26·40	26·45

100 piastres = 20 French francs = 3s. 9d.

TURKEY.

By a decree of November 13, published November 20, 1936, the Turkish import duties on cotton yarns were reduced by amounts ranging from 20 per cent. to 60 per cent. of the existing rates, according to a report of January 14 from Istanbul.

(Under the Turkish import control regime for 1937, cotton yarns are subject to import permits to be obtained in advance from the Ministry of Economy.)

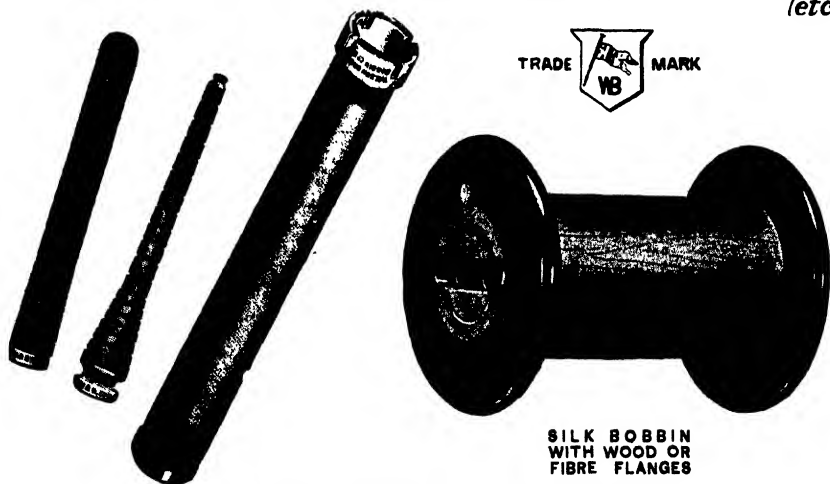
MORE JAPANESE SPINNING MILLS IN CHINA.

Figures issued by the Japan Cotton Spinners' Association of China show that the Japanese spinning mills in China and Manchuria had, at the end of 1936, a total of 2,141,216 spindles, which is 136,064 greater than at the end of 1935. The number of doubling spindles and looms had also increased by the end of 1936 by 26,354 spindles and 5,516 looms to 366,422 spindles and 29,314 looms. The total number of spindles is distributed as under:—

	End of 1936	Compared with end of 1935
Shanghai	1,349,720	— 2,292
Tsingtao	523,204	+ 30,720
Manchukuo, Kuantung and Hankow	268,292	+ 107,636

Freedom of action, a plentiful supply of Chinese cotton at a low price, a stabilized currency, and increased purchasing power of the agricultural population are advanced as reasons for the development of the Japanese cotton industry in China.

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COTTON TRADE STATISTICS

JAPAN.

EXPORTS OF COTTON PIECE GOODS, 1936.

Country of Destination	Grey sq. yds.	Bleached sq. yds.	Dyed, Printed and Yarn Dyed	Total sq. yds.
			sq. yds.	
Korea	87,431,140	16,998,382	72,834,322	177,263,844
Dairen	23,278,106	3,805,267	9,750,835	36,834,208
Vladivostock	—	—	—	—
Newchang	354,524	120,196	469,827	944,547
Kwantung	28,812,972	33,556,759	64,377,636	126,747,367
Northern China	347,988	3,473,631	2,025,877	5,847,496
Middle China	16,534,360	8,013,391	5,042,242	29,589,993
Southern China	44,983	1,741,198	56,350	1,842,531
Russian Asia	—	—	—	—
Hong Kong	22,123,594	12,146,405	50,377,321	84,647,320
French Indo-China	396	5,523	35,093	41,012
Siam	9,474,928	19,943,603	42,767,395	72,185,926
British Malay	4,576	59,498	916,991	981,065
Straits Settlement	6,920,262	9,159,398	32,299,066	48,378,726
British India	274,788,949	54,168,441	150,756,725	479,714,115
Ceylon	324,071	2,300,531	6,490,124	9,114,726
Iran	18,700	1,187,123	7,025,507	8,231,330
Iraq	16,305,420	11,329,148	27,803,447	55,438,015
Syria	11,890,873	7,054,399	26,888,407	45,833,679
Palestine	1,411,001	2,844,780	8,270,974	12,526,755
Arabia	4,962,690	2,501,735	5,381,106	12,845,531
Aden	42,314,675	8,261,403	8,919,812	59,495,890
Cyprus	1,530	—	8,000	9,530
Philippine Islands	1,962,549	10,562,722	32,024,285	44,549,556
British Borneo	6,996	108,328	237,500	352,824
Dutch India	94,776,787	64,888,985	191,813,317	351,479,089
U.S.A.	636,412	59,346,715	13,449,552	73,432,679
Canada	8,240	110,016	701,192	819,448
Mexico	103,620	110,971	494,637	709,228
Guatemala	78,030	285,825	142,862	506,717
Honduras	3,679,597	737,206	9,169,938	13,586,741
Salvador	—	—	19,545	19,545
Nicaragua	1,128,635	861,173	967,606	2,957,414
Costa Rica	2,041,815	592,313	4,477,337	7,111,465
Panama	837,811	462,713	3,384,635	4,685,159
Panama Zone	187,426	46,613	486,610	720,649
Cuba	—	48,105	503,712	551,817
Jamaica	12,363	13,427	68,613	94,403
Haiti	3,483,567	1,047,364	4,194,286	8,725,217
Dominic Republic	3,163,575	1,026,238	8,329,891	12,519,704
Bahamas	—	2,222	1,878	4,100
Porto Rica	—	8,737,520	4,025,432	12,762,952
St. Vincent	800	—	1,840	2,640
Trinidad and Tobago	18,096	13,230	13,183	44,509
Curacao	24,867	428,796	889,927	1,343,590
Peru	284,137	540,175	5,642,430	6,466,742
Chile	24,661,291	2,389,416	5,947,084	32,997,791
Argentina	10,755,974	18,603,374	52,052,370	81,411,718
Uruguay	2,828,196	1,622,568	6,351,259	10,802,023
Brazil	361,099	97,925	554,159	1,013,183
French Guiana	—	460	—	460
Dutch Guiana	238,128	971,646	1,742,112	2,951,886

COTTON TRADE STATISTICS

JAPAN: EXPORTS OF COTTON PIECE GOODS, 1936—continued.

Country of Destination	Grey sq. yds.	Bleached sq. yds.	Dyed, Printed and Yarn Dyed		Total sq. yds.
			sq. yds.	sq. yds.	
British Guiana	5,600	13,377	140,795	—	159,772
Venezuela	574,872	7,140,540	18,884,191	—	26,600,603
Colombia	20,207	23,418	67,385	—	111,010
Ecuador	1,266,074	2,139,824	3,360,605	—	6,766,503
Great Britain	16,583,952	550,814	1,946,925	—	19,081,691
Irish Free State	192,050	810,501	1,100,774	—	2,103,325
France	3,586,317	12,572,170	2,236,999	—	18,395,486
Germany	22,943,590	2,138,355	1,763,964	—	26,845,909
Italy	3,678,662	1,136,254	260,538	—	5,075,454
Switzerland	—	—	18,720	—	18,720
Austria	15,262	7,744	—	—	23,006
Czecho-Slovakia	108,167	—	—	—	108,167
Poland and City of Danzig	—	—	—	—	—
Belgium and Luxemburg	2,464,883	908,792	10,449,625	—	13,823,300
Netherlands	1,593,875	93,914	152,725	—	1,840,514
Denmark	70,787	59,507	39,436	—	169,730
Russia	—	—	—	—	—
Finland	853,637	659,253	4,419,521	—	5,932,411
Sweden	5,692,920	1,597,197	2,264,167	—	9,554,284
Norway	4,628,609	1,279,250	1,313,210	—	7,221,069
Portugal	—	52,324	94,549	—	146,873
Spain	—	—	1,400	—	1,400
Gibraltar	50,360	520,935	591,596	—	1,162,891
Greece	127,463	1,262,209	2,284,213	—	3,673,885
Turkey	11,678,812	2,586,663	11,933,296	—	26,198,771
Malta	—	—	40,920	—	40,920
Egypt	24,102,886	16,120,574	65,899,420	—	106,122,880
Anglo-Egyptian Sudan	41,779,993	11,045,885	9,647,920	—	62,473,798
French Somali Coast	14,012,238	882,023	208,124	—	15,102,385
Italian Somaliland	9,000	51,927	—	—	60,927
Eritrea	—	—	—	—	—
Kenya, Uganda and Tanganyika	37,563,342	11,755,020	51,064,938	—	100,383,300
Mozambique	2,216,366	350,785	7,269,245	—	9,836,396
Union of South Africa	7,202,165	2,818,452	19,645,069	—	29,665,686
Belgian Congo	7,437,848	1,152,156	16,934,463	—	25,524,467
Cameroons	2,136,437	789,105	4,899,942	—	7,825,484
Nigeria	1,046,676	620,154	3,331,252	—	4,998,082
Gold Coast	177,371	508,925	762,722	—	1,449,018
Liberia	90,002	197,909	894,330	—	1,182,241
Sierra Leone	—	3,986	2,333	—	6,319
Senegal	42,275	53,491	1,162,090	—	1,257,856
French Morocco	680,474	44,594,612	23,705,154	—	68,980,240
Spanish Morocco	432,633	3,792,275	1,313,783	—	5,538,691
Algeria	112,026	2,390,548	1,410,391	—	3,912,965
Tunis	—	—	1,350	—	1,350
Libya	90,000	—	8,656	—	98,656
Canary Islands	253,984	390,828	1,314,258	—	1,959,070
Madagascar and Reunion	27,799	2,340	20,810	—	50,949
Mauritius	53,300	54,307	589,792	—	697,399
Australia	27,693,671	10,524,185	31,500,242	—	69,718,098
New Guinea	121,247	96,681	1,781,019	—	1,998,947
New Caledonia	10,748	4,613	439,122	—	454,483
New Zealand	3,964,706	2,180,297	6,135,992	—	12,280,995
Gilbert and Ellice Is.	3,109	303,569	529,383	—	836,061
Fiji Island	1,320	23,847	195,476	—	220,643
Society Islands	6,308	20,784	29,862	—	56,954
Hawaii	35,627	243,572	1,493,231	—	1,772,430
Others	14,990,816	9,576,155	30,841,897	—	55,408,868
Total for 1936 (sq. yds.)	961,036,215	528,428,903	1,216,592,069	—	2,706,057,187
Total for 1936 (yen)	142,865,617	85,183,575	254,455,669	—	482,504,861
CORRESPONDING TOTALS FOR 1935:					
Total for 1935 (sq. yds.)	939,802,857	510,375,960	1,265,683,413	—	2,715,862,230
Total for 1935 (yen)	144,009,286	85,347,497	264,718,202	—	494,074,985

U.S.A.

IMPORTS OF RAW COTTON AND COTTON MANUFACTURES INTO
U.S.A., FOR THE YEAR ENDING DECEMBER 31st, 1936.

					Twelve months ending December, 1936	
					Quantity	Dollars
COTTON, UNMANUFACTURED	..	..	lb.		105,687,654	11,997,335
Staple under 1½ in., free	..	..	..	"	50,418,024	4,699,833
Staple 1½ to 1¾ in., dut	..	..	..	"	12,891,954	2,323,750
Staple 1¾ in. or over, dut	..	..	..	"	21,163,161	4,143,037
Cotton linters, free	..	..	..	"	21,214,515	830,735
COTTON SEMI-MANUFACTURES	..	..			—	6,284,805
Cotton waste, free	..	..	..	"	99,109,342	4,633,113
Yarns and warps :						
Not bleached, dyed, etc., dut	..	..	..	"	2,200	332
Bleached, dyed, combed or piled, dut	..	..	..	"	2,123,536	1,651,360
COTTON MANUFACTURES	..	..			—	42,338,175
Sewing thread, crochet, darning, and embroidery cotton, dut	..	..	1,000 yd.		878,956	510,811
Cotton cloth :						
Not bleached, etc., dut	..	..	sq. yd.		4,332,104	809,931
Bleached, dut	..	..	..	"	74,767,312	4,465,809
Printed, coloured, etc., dut	..	..	..	"	35,085,969	5,282,641
Cotton fabrics, n.e.s. :						
Cloth, less than 17 per cent. wool, dut.	..	..	lb.		4,448	5,753
Tapestries and upholstery, dut	..	..	..		—	1,000,156
Velvets and velveteens, dut	..	..	sq. yd.		5,213,885	786,347
Other pile fabrics, dut	..	..	..	"	—	221,147
Table damask, dut	..	..	lb.		883,398	649,148
Table covers, napkins, etc., dut	..	..	..		—	1,099,688
Blankets and blanket cloth, dut	..	..	..	"	24,661	6,380
Bedspreads and quilts, dut	..	..	No.		1,587,066	1,111,307
Sheets, cases, towels, etc., dut	..	..	..		—	260,705
Wearing apparel :						
Knit or crocheted goods :						
Gloves and mittens, dut	..	..	doz. pr.		1,941,818	4,131,031
Hosiery, dut	..	..	..	"	2,313,236	952,309
Underwear and other, dut	..	..	..	"	—	418,459
Wearing apparel, not knit, dut	..	..	..	"	—	438,815
Apparel wholly or partly of lace, or embroidered, etc., dut	..	..	..	"	—	143,975
From Philippine Islands, free	..	..	..	"	—	4,751,754
Handkerchiefs :						
Not embroidered, nor of lace, dut	..	..	doz.		5,164,643	685,993
Embroidered, etc., dut	..	..	No.		166,122	16,170
Laces, embroideries, etc. :						
Handmade laces, lace fabrics, and lace articles over 2 in. wide, valued over 50 dollars per lb., dut	..	..	lb.		175	19,446
Handmade laces, n.e.s., dut	..	..	..	"	—	218,806
Machine-made laces, dut	..	..	..	"	—	3,075,703
Lace articles, etc., dut	..	..	..	"	—	253,629
Lace window curtains, dut	..	..	..	"	—	689,415
Embroideries, dut	..	..	..	"	—	22,423
Other articles, trimming, etc., dut	..	..	..	"	—	1,117,132
From Philippine Islands, free	..	..	..	"	—	243,237
Cotton floor coverings, dut.	..	..	sq. yd.		15,895,777	4,365,114
Belts and rope used as belting, dut	..	..	lb.		329,881	140,811
Rags, except paper stock, dut	..	..	..	"	25,304,806	1,224,188
All other, dut	..	..	..	"	—	3,219,942

EXPORTS OF RAW COTTON AND COTTON MANUFACTURES FROM
U.S.A. FOR THE YEAR ENDING DECEMBER 31st, 1936

					Twelve months ending December, 1936	
					Quantity	Dollars
COTTON, UNMANUFACTURED	..	..	{ bales	5,641,646	}	361,043,236
			1,000 lb.	2,974,147		
Raw cotton, except linters	...	..	{ bales	5,408,547	}	353,822,454
			1,000 lb.	2,826,078		
American Egyptian (Pima)	..	..	{ bales	302	}	18,823
			1,000 lb.	160		
Other 1½ in. and over	..	..	{ bales	21,123	}	1,484,650
			1,000 lb.	10,987		
Upland, under 1½ in.	..	..	{ bales	5,387,122	}	352,318,981
			1,000 lb.	2,814,931		
<hr/>						
Linters :						
Grades 1 to 7, inclusive	..	..	{ bales	231,157	}	7,179,798
			1,000 lb.	146,750		
Grade 8	..	..	{ bales	1,942	}	40,984
			1,000 lb.	1,319		
<hr/>						
COTTON SEMI-MANUFACTURES	..	..	.. lb.	116,752,520		10,674,089
<hr/>						
Cotton pulp..	..	..	..	30,499,309		2,488,638
Cotton mill waste (except card strips and comber waste)	..	..	..	50,110,456		3,685,972
Cotton rags, except paper stock	..	..	..	16,246,346		896,098
Cotton batting, carded cotton and roving	..	..	..	617,193		104,580
Cotton card strips and comber waste	..	..	..	13,530,867		1,317,208
Cotton yarn :						
Carded yarn, not combed	..	..	..	3,425,224		992,999
Combed yarn :						
Mercerized	..	..	..	1,632,820		927,679
Not mercerized	..	..	..	690,305		269,915
<hr/>						
COTTON MANUFACTURE	..	..	..	—		33,003,812
<hr/>						
Cotton thread and cordage :						
Sewing thread	..	..	..	923,083		744,294
Crochet, darning, and embroidery cotton	..	..	..	30,345		27,653
Twine and cordage	..	..	..	2,671,531		844,859
<hr/>						
					Twelve months ending December, 1936	
					Quantity	Dollars
Cloth, duck, and tyre fabric	sq. yd.	200,500,193		21,873,958
<hr/>						
Tyre fabric :						
Cord	1,167,328		323,785
Other	912,591		238,136
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Cotton duck	5,868,272		1,471,307
<hr/>						
Heavy filter, paper dryer, hose and belting duck	528,930		200,717
Unbleached :						
Ounce	..	..	..	2,643,968		450,142
Numbered	..	..	..	1,958,547		603,383
Bleached	..	..	..	231,621		61,115
Coloured	..	..	..	505,206		155,950
<hr/>						
Cotton cloth, unbleached	..	..	..	51,748,817		3,681,097

IMPORTS OF U.S.A. COTTON GOODS, &c.—*continued*

					Twelve months ending December, 1936	
					Quantity	Dollars
Drills, twills, and sateens	sq. yd.				4,848,901	470,583
Sheetings, 40 in. wide and under ..	"				25,602,870	1,577,594
Sheetings over 40 in. wide	"				608,544	55,997
Osnaburgs	"				16,459,510	1,274,150
All other unbleached	"				19,223,820	302,773
Cotton cloth, bleached	"				38,279,148	3,929,783
Drills, twills and sateens	"				3,478,148	574,652
Pyjama checks	"				381,573	35,716
Sheetings 40 in. wide and under ..	"				8,939,908	829,243
Sheetings over 40 in. wide	"				5,910,818	631,917
All other bleached	"				19,568,701	1,858,235
Cotton cloth, coloured	"				102,524,037	12,229,870
Voiles	"				3,625,215	383,035
Percales and prints, 32 in. and narrower ..	"				446,037	48,434
Percales and prints, over 32 in. wide ..	"				10,759,289	1,141,890
Flannels and flannelettes	"				1,279,031	144,692
Khaki and fustians	"				3,097,389	630,506
Denims	"				9,964,187	1,327,864
Suitings (drills, etc.)	"				11,470,729	1,660,652
Ginghams	"				259,621	29,016
Chambrays	"				9,281,358	787,561
Other printed fabrics :						
7½ and more yds. per lb.	"				10,895,514	1,309,153
Less than 7½ yds. per lb.	"				10,315,387	1,140,382
Other piece-dyed fabrics :						
5 and more yds. per lb.	"				20,179,519	1,987,221
Less than 5 yds. per lb.	"				6,470,698	864,964
Other yarn-dyed fabrics	"				2,585,216	421,788
Cotton and rayon mixtures (chief value cotton)	"				1,894,847	352,712
Other cotton fabrics :						
Blankets	lb.				645,472	302,584
Damasks	sq. yd.				225,834	51,747
Tapestries and other upholstery goods ..	"				481,968	179,188
Velveteens	"				90,136	65,042
Corduroys	"				10,682	5,247
Plushes	"				121,810	81,350
Other pile fabrics	"				35,623	17,467
Fabrics sold by the lb.	lb.				5,003,504	1,115,647
Cotton wearing apparel					—	3,835,424
Knit goods :						
Gloves	doz. pr.				40,624	70,733
Hosiery	"				321,680	472,928
Women's	"				53,939	88,223
Children's	"				102,951	122,301
Men's socks	"				164,790	262,404
Underwear :						
Men's and boys'	doz.				83,263	239,761
Women's and children's	"				54,627	154,458
Sweaters, shawls, and other knit outerwear	No.				226,250	109,808

IMPORTS OF U.S.A. COTTON GOODS, &c.—*continued*

				Twelve months ending December, 1936	
				Quantity	Dollars
Other wearing apparel :					
Cotton overalls, breeches, and pants	doz.			18,987	174,526
Underwear, not knit	"			47,547	166,479
Shirts	"			91,528	934,813
Dresses, skirts and blouses	No.			1,272,364	1,015,317
Other cotton clothing .. .. .	..			—	496,601
Other cotton manufactures :					
Handkerchiefs	doz.			152,992	108,029
Laces, embroideries, and lace window curtains	yd.			2,870,939	116,884
Woven belting for machinery	lb.			201,931	113,752
Cotton bags	"			5,343,493	1,402,766
Quilts, comforts, counterpanes, and bedspreads	No.			89,481	135,303
Bed sheets, pillow, bolster, and mattress cases	doz.			18,042	90,432
Towels, bath mats, and wash cloths ..	"			156,865	324,514
Other cotton manufactures, n.e.s. ..	..			—	1,567,672

Cotton Textile Imports into India.

(From a Report prepared by H.M. Senior Trade Commissioner in India.)

Imports of cotton yarns and piece goods into India during the first nine months of the fiscal year, April 1, 1936, to December 31, 1936, were as follows :—

Cotton Yarns.—The total imports fell heavily from 31,085,189 lbs. valued at Rs.266.5 lakhs to 23,326,708 lbs. valued at Rs.200.8 lakhs. The share of the United Kingdom dropped from 7,131,811 lbs. (Rs.72½ lakhs) to 5,797,233 lbs. (Rs.58 lakhs). Arrivals from Japan were also reduced from 14,721,476 lbs. (Rs.128 lakhs) to 12,584,834 lbs. (Rs.105 lakhs) and those from China from 9,184,387 lbs. (Rs.66 lakhs) to 4,921,226 lbs. (Rs.37½ lakhs).

Grey Piece Goods (Plain Grey).—There was a considerable reduction in the total imports under this heading from 158,973,682 yards value at Rs.198½ lakhs in the first three quarters of 1935-36 to 136,856,266 yards valued at Rs.160½ lakhs in the corresponding period of 1936-37. The fall was shared by all supplying countries, shipments from the United Kingdom being reduced heavily from 15,776,410 yards (Rs.20½ lakhs) to 9,382,245 yards (Rs.13½ lakhs). Japanese sendings also fell from 142,938,487 yards (Rs.177½ lakhs) to 127,405,355 yards (Rs.146½ lakhs).

Grey Piece Goods (Bordered Greys).—This heading also shows a reduction both in quantity and value as compared with the corresponding period of the preceding year, the total trade decreasing from 86,141,731 yards valued at Rs.121½ lakhs to 72,859,996 yards valued at Rs.102.5 lakhs. This reduction was entirely borne by the United Kingdom, her share falling from 46,133,985 yards

(Rs.76 lakhs) to 30,424,034 yards (Rs.53½ lakhs). On the other hand, arrivals from Japan rose from 40,007,746 yards (Rs.45½ lakhs) to 42,429,062 yards (Rs.40¼ lakhs).

White Piece Goods (Bleached).—The aggregate imports again receded from 197,052,375 yards valued at Rs.366¼ lakhs to 162,622,140 yards valued at Rs.323 lakhs. The reduction in the total trade was borne by the United Kingdom, Japan and "other countries," the share of the former falling from 147,553,560 yards (Rs.285¾ lakhs) to 118,762,855 yards (Rs.244¾ lakhs). Imports from Japan were also reduced from 45,540,702 yards (Rs.65½ lakhs) to 38,939,901 yards (Rs.59½ lakhs). On the other hand, imports from Switzerland showed a 50 per cent. increase both in quantity and value from 2,063,408 yards (Rs.8½ lakhs) to 3,105,856 yards (Rs.12¾ lakhs). Sendings from Holland remained much about the same at 1,110,345 yards (Rs.3 lakhs) in the first nine months of 1935-36 and 1,174,148 yards (Rs.3¼ lakhs) in the corresponding period of 1936-37.

Printed Piece Goods.—The total trade under this heading decreased from 162,393,993 yards valued at Rs.245 lakhs to 149,373,329 yards valued at Rs.235 lakhs. Practically the whole of this fall was due to a reduction in the United Kingdom share of the imports from 50,457,769 yards (Rs.112¾ lakhs) to 37,401,920 yards (Rs.82½ lakhs). As against this there was a slight increase in the Japanese share in quantity from 111,792,916 yards to 111,832,871 yards and a larger increase in value from Rs.131¾ lakhs to Rs.152¼ lakhs.

Dyed Piece Goods.—Arrivals under this heading during the period under review amounted to 60,374,503 (Rs.151¾ lakhs) as against 76,422,260 yards (Rs.175½ lakhs) during the corresponding period of the preceding year. The reduction was again largely attributable to a fall in arrivals from the United Kingdom although the Japanese share of the trade also diminished. Arrivals from the United Kingdom during the period under review amounted to 45,722,432 yards (Rs.121¾ lakhs) as against 57,182,552 yards (Rs.143¾ lakhs) in the same period of the preceding year, whilst shipments from Japan over the two periods were reduced from 16,381,441 yards (Rs.22½ lakhs) to 11,207,317 yards (Rs.19 lakhs). On the other hand, there was an increase in the share of Switzerland from 1,631,695 yards (Rs.5¾ lakhs) to 2,101,214 yards (Rs.6¾ lakhs). The other principal supplier is Italy, which slightly increased its sendings from 353,024 yards (Rs.1 lakh) to 450,587 yards (Rs.1½ lakhs).

Woven Coloured Goods.—Here, again, there has been a heavy fall in the total trade by over 50 per cent. in quantity from 23,566,732 yards to 11,282,020 yards and a smaller proportionate reduction in value from Rs.55½ lakhs to Rs.30½ lakhs. Both the United Kingdom and Japan suffered by this reduction, arrivals from the United Kingdom decreasing from 6,384,096 yards (Rs.19½ lakhs) to 2,608,923 yards (Rs.10 lakhs) and those from Japan from 16,559,818 yards (Rs.33 lakhs) to 8,316,492 yards (Rs.18¾ lakhs).

Fents.—The total trade rose from Rs. 53½ lakhs to Rs. 71½ lakhs, largely due to a heavy increase in Japanese shipments from Rs. 42½ lakhs to Rs. 60½ lakhs. Imports from the United Kingdom rose from Rs. 7 lakhs to Rs. 8½ lakhs whilst shipments from the U.S.A. fell from Rs. 4½ lakhs to Rs. 1½ lakhs.

Cotton Sewing Thread.—This trade recorded an advance from 1,515,396 lbs. valued at Rs. 39½ lakhs to 1,873,906 lbs. valued at Rs. 41½ lakhs. The major portion of the trade is obtained by the United Kingdom whose share, however, remained practically stationary at 1,217,788 lbs. (Rs. 32½ lakhs) and 1,287,392 lbs. (Rs. 32 lakhs) in the first nine months of 1935-36 and 1936-37 respectively. A noticeable feature is the large proportionate increase in the imports from "other countries" over the two periods from 297,608 lbs. (Rs. 6½ lakhs) to 586,514 lbs. (Rs. 9 lakhs).

WORLD PRODUCTION OF RAYON AND STAPLE FIBRE.

Preliminary estimates of the world production of rayon during 1936, both continuous filament and staple fibre, show an appreciable increase over the previous year's production. The figures available up to date, of the production of continuous filament rayon and staple fibre, are published below in Tables I and II:—

TABLE I.—ESTIMATED WORLD RAYON YARN PRODUCTION
(excluding staple fibre)

Country				(in thousands of lbs.)		
				1936	1935	1934
Japan .. .. .	..	..	..	285,000	220,000	155,300
U.S.A. .. .. .	..	..	..	278,000	257,500	210,300
Britain .. .. .	..	..	..	116,815	111,900	92,855
Germany .. .. .	..	..	..	112,000	104,000	90,000
Italy .. .. .	..	..	..	88,000	86,000	84,700
France .. .. .	..	..	..	42,500	53,000	58,000
Netherlands .. .. .	..	..	..	21,000	20,000	20,500
Russia .. .. .	..	..	..	14,000	12,500	12,000
Belgium .. .. .	..	..	..	13,500	13,500	12,750
Canada .. .. .	..	..	..	12,000	12,750	9,250
Poland .. .. .	..	..	..	11,285	11,260	9,620
Other Countries .. .. .	..	..	..	29,790	28,550	28,000
Total .. .. .	..	..	..	<u>1,023,890</u>	<u>930,960</u>	<u>783,275</u>

TABLE II.—ESTIMATED WORLD STAPLE FIBRE PRODUCTION
(in thousands of lbs.)

Country				(in thousands of lbs.)		
				1936	1935	1934
Italy .. .. .	..	..	..	100,000	66,000	22,000
Germany .. .. .	..	..	..	65,000	32,000	18,000
Japan .. .. .	..	..	..	40,000	13,500	2,500
Britain .. .. .	..	..	..	23,885	10,000	3,000
France .. .. .	..	..	..	12,000	8,000	4,000
U.S.A. .. .. .	..	..	..	12,000	6,000	2,200
Poland .. .. .	..	..	..	1,150	700	700
Netherlands .. .. .	..	..	..	1,000	500	—
Total .. .. .	..	..	..	<u>255,035</u>	<u>136,700</u>	<u>52,400</u>

The estimated production of continuous filament rayon yarns by countries and processes is now available and is shown in Table III:—

TABLE III.—ESTIMATED PRODUCTION OF CONTINUOUS FILAMENT RAYON BY COUNTRIES AND PROCESSES, 1936
(in thousands of lbs.)

Country	Viscose	Acetate	Cuprammonium, etc.	Total
Japan	272,000	1,000	12,000	285,000
U.S.A.	208,500	63,000	6,500	278,000
Great Britain	96,950	17,195	2,670	116,815
Germany	98,500	2,500	11,000	112,000
Italy	83,000	3,400	1,600	88,000
France	39,250	3,250	—	42,500
Netherlands	21,000	—	—	21,000
Russia	14,000	—	—	14,000
Belgium	12,600	900	—	13,500
Canada	7,750	4,250	—	12,000
Poland	11,285	—	—	11,285
Switzerland	8,250	—	—	8,250
Czecho-Slovakia	7,400	—	—	7,400
Spain	5,500	—	—	5,500
Brazil	2,800	1,600	—	4,200
Sweden	2,000	—	—	2,000
Austria	1,500	—	—	1,500
Argentine	—	500	—	500
Hungary	—	—	240	240
Greece	200	—	—	200
Total	892,285	97,595	34,010	1,023,890

IMPORTS OF RAW COTTON INTO PORTUGAL.

(In thousands of kgs.)								
Country of Origin	1930	1931	1932	1933	1934	1935	1936	%
Portuguese colonies	830	786	1,799	2,533	2,639	2,984	5,330	26
United States of America ..	12,012	9,932	16,605	16,580	11,049	12,821	9,470	46.3
Brazil	2,967	2,222	246	314	5,387	4,272	2,436	11.9
Egypt	74	43	239	612	739	1,001	1,212	5.9
British India ..	239	189	295	286	551	809	958	4.9
Other countries ..	1,130	912	1,387	1,135	734	1,551	1,013	5
Total	17,252	14,086	20,571	21,280	21,099	23,438	20,431	100

(Figures supplied by Messrs. Arantes Pereira, of Oporto)

The 1936 percentages of the world's total production of textile fibres on a total weight of about 26,000,000,000 lbs. are estimated as follows:—

	Per cent.
Cotton	53.7
Wool	14.5
Jute	13.3
Hemp	6.9
Flax	6.3
Rayon	3.9
Staple fibre ..	1.1
Silk	0.3

MISCELLANEOUS

COTTON ROADS IN EGYPT.

An English road engineer has made experiments in Alexandria, Egypt, with cotton cloth roads, and it is stated that they are proving quite satisfactory, as there are signs that they are standing up well to the traffic. It has also been found that these cotton cloth roads coated with bitumen are very much quieter than the old roads which they have replaced. These roads are not subject to heavy traffic, but the usual Egyptian traffic such as donkey carts, camels, etc., but the carts are usually shod with thin iron hoops.

From the same source we hear that cotton cloth and bitumen is being used to cover the flat Egyptian roofs in order to make them waterproof. Similarly, experiments with bitumen-coated cotton cloth to prevent damp from percolating through walls have proved their usefulness. In the whole of the East flat roofs are used exclusively; this outlet for cotton cloth should be of considerable importance.

STATE OF TRADE REPORTS.

CZECHO-SLOVAKIA.

The position in the Czecho-Slovakian cotton spinning section has improved during the first quarter of this year as compared with the same period of 1936.

The degree of occupation of the spinning mills is estimated on an average at about 85 per cent. of the normal capacity. The demand for yarns was active, but these are regulated through the present quota cartel. The rising prices of raw materials have caused an increase in the yarn prices.

The position of exports is clearly shown by the table given in the original report below:—

In Beantwortung Ihres Schreibens vom 24. v.M. erlauben wir uns Ihnen im Nachstehenden den gewünschten Bericht für das International Cotton Bulletin zu übermitteln:—

Die Geschäftslage der csl. Baumwollspinnereien hat sich im 1. Vierteljahr gegenüber dem Vorjahr gebessert. Die Betriebsausnutzung der Spinnereien kann im Durchschnitt auf etwa 85 % der normalen Kapazität geschätzt werden. Die Nachfrage nach Garnen war lebhaft, doch wird diese durch das bestehende Kontingentierungskartell geregelt. Die wachsenden Rohmaterialkosten bewirkten eine weitere Steigerung der Garnpreise.

Die Lage des Exportgeschäftes erhellt die folgende Zusammenstellung:—

EXPORT VON BAUMWOLLGARNEN UND WAREN
(EXPORT OF COTTON YARNS AND GOODS)

				IV. Quartal 4th quarter 1936 quintals	IV. Quartal 4th quarter 1935 quintals
Baumwollgarne (<i>cotton yarns</i>)	..	..	..	35,205	58,038
Baumwollwaren (<i>cotton goods</i>)	..	..	..	28,175	24,597
zusammen (<i>total</i>)	..	..	..	63,380	82 635

(*Hospodarsky Svaz Csl. Pradelen Bavlny, Prague.*)

SWITZERLAND.

During the past quarter the whole of the cotton industry was fully occupied within the limits established by the collective restrictions on production and a partial lack of qualified operatives. Spinners could only book short-term orders in exceptional cases. The weaving section reported conditions as varying from satisfactory to good as regards demand; on the other hand, prices obtained for coarse cloths were not always remunerative. Apart from the doubling section, where a slight increase in the number of working spindles is reported, the degree of occupation shows no change since the previous quarter.

Wages have been somewhat increased in those mills where the reduction in the immediately preceding depression years was most pronounced. So far these increases have affected about 7 per cent. of the operatives, and the increase varies between 4 and 6 per cent.

The following is the original report in German:—

Die gesamte Baumwollindustrie war im Berichtsquartal innerhalb der durch die kollektiven Produktionseinschränkungen und teilweisen Mangel an qualifizierten Arbeitskräften gezogenen Grenzen voll beschäftigt. Die Spinnerei konnte kurz befristete Aufträge nur noch ausnahmsweise hereinnehmen. Die Weberei verzeichnete mengemässig befriedigenden bis guten Absatz, dagegen liessen die erzielbaren Preise für grobe Tücher vielfach zu wünschen übrig. Die Ausnützung der Produktionskapazität hat, von der Zwirnererei, die eine leichte Erhöhung, der beschäftigten Spindelzahl meldet, abgesehen, keine Änderungen gegenüber dem Vorquartal erfahren. Die Arbeitslöhne wurden in jenen Betrieben vereinzelt etwas erhöht, wo der Abbau in den vorausgegangenen Krisenjahren aussergewöhnlich gross war. Von diesen Korrekturen wurden bisher ca. 7 % der Gesamtbelegschaft betroffen, wobei die Aufbesserungen um 4 bis 6 % schwankten.

(*Schweizerischer Spinner, Zwirner-und Weber-Verein.*)

Reviews on Current Cotton Literature.

"WORLD COTTON PRODUCTION AND TRADE." Published by the International Institute of Agriculture, Villa Umberto I, Rome. Price 30 lire net.

An exceptionally comprehensive and at the same time clear and concise publication dealing with the many and varied aspects of the world's cotton trade.

Part I consists of a description of the geography of cotton production whilst Part II describes the conditions of cotton marketing and movements of cotton prices. The Evolution of the World Cotton Trade forms the subject of Part III, whilst the cotton industry, both nationally and internationally, is treated exhaustively in Part IV. In this connection the main cotton manufacturing countries of Europe, Asia and America are all discussed separately. A special feature of the publication is the immense amount of useful tabular matter for reference, and the maps and diagrams which form an appendix to the book.

"UNITED STATES YEARBOOK OF AGRICULTURE, 1936." Published by the United States Government Printing Office, Washington, D.C.

A most voluminous publication of some 1,200 pages covering research work in every branch of United States Agriculture during last year. Indeed, so far as the cotton section is concerned, details of cultivation are given, not only for the United States but for most other cotton producing countries, such as India, China, Egypt, U.S.S.R., Brazil, Peru, Mexico, Argentina, Uganda, Sudan, Chosen and Manchukuo, etc. Descriptions of experiments conducted with the object of combatting the boll-weevil and other cotton pests are fully dealt with, as well as experiments made with the object of improving the various strains. A chapter entitled "A Challenge to the Superiority of American Cotton" shows that the United States cotton producers fully realize the competition with which they have to contend to-day.

We highly commend the cotton section of this book to all who are in any way interested in the cotton trade.

"THE EMPIRE COTTON GROWING REVIEW," April, 1937. Published by P. S. King & Son Ltd., 14, Great Smith Street, London, S.W.1, for the Empire Cotton Growing Corporation. Quarterly. Annual subscription, 5s.

Featuring prominently amongst the articles in the current issue are the following:—

"The Imperial Agricultural Bureaux," by Sir David Chadwick.

"The First Ten Years of the Amani Research Station," by W. Nowell.

"American Cotton Restriction and its Effect on Outside Growths," by J. A. Todd.

"The Rôle of 'Deflowering' in Cotton Production," by B. N. Singh and R. S. Choudhri.

"STANDARDS ON TEXTILE MATERIALS." Published by the American Society for Testing Materials, 260, South Broad Street, Philadelphia, Penn., U.S.A.

This book contains the methods of testing, definitions, terms and specifications for textile materials developed by the American Society for Testing Materials, and materials relating thereto. It is published for the purpose of presenting in a single cover, data which the Society believes to be of much importance to all who deal with testing materials.

"CENSO ALGODONERO DE LA REPUBLICA ARGENTINA," 1935-36. (312 pages.)

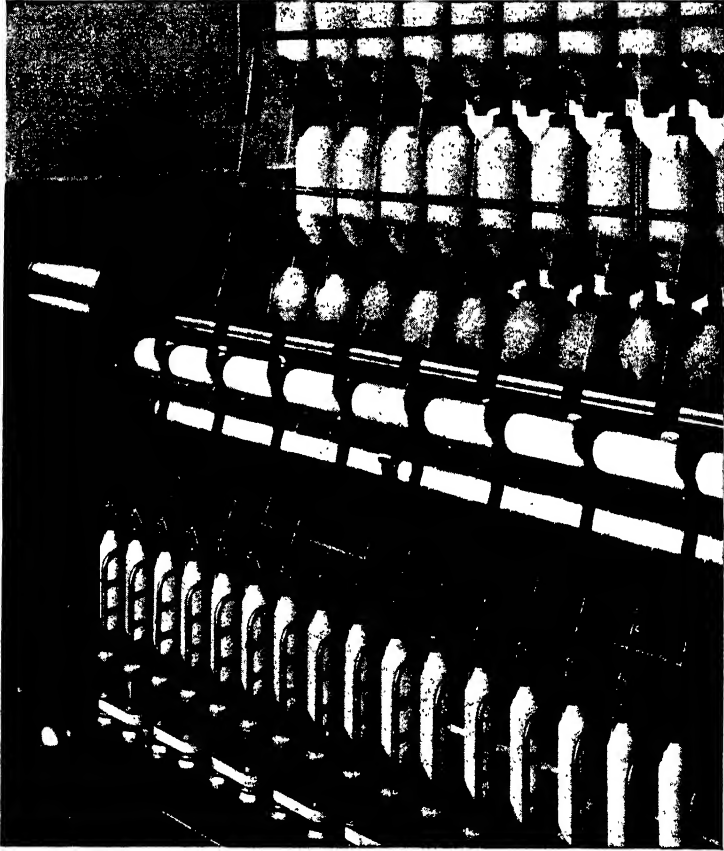
The Cotton Department of the Argentine Ministry of Agriculture has recently issued the result of a census taken among the cotton farmers in Argentina. The figures collected relate to the season 1935-36 and deal pre-eminently with the number of cotton planters, area cultivated, number of cotton farms, nationality of cultivators, etc. The report also goes into detail as regards the possibility of future experiments in the various cotton-growing states of Argentina. The report is profusely illustrated with graphs and maps.

BOOKS RECEIVED.

"A REPORT ON THE ECONOMIC AND COMMERCIAL CONDITIONS IN U.S.A.," December, 1936. By the Commercial Counsellor to H.M. Embassy at Washington, D.C. Printed and published for the Department of Overseas Trade by H.M. Stationery Office; price 3s. net.



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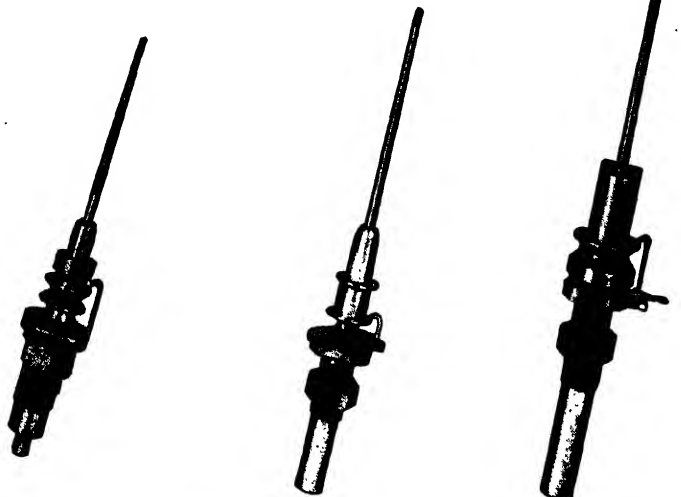
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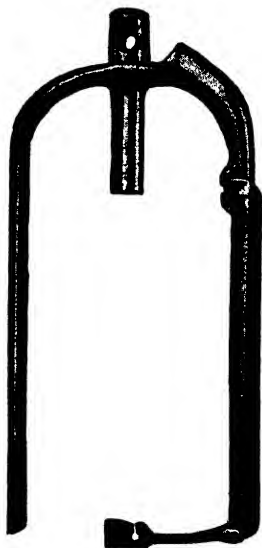
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(VOL. XV, No. 60)

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COMMITTEE'S COMMUNICATIONS

RESUMÉ OF MINUTES OF THE MEETING
OF THE

International Cotton Committee

HELD AT THE

AMSTEL HOTEL, AMSTERDAM, on TUESDAY, MAY 4, 1937

AT 9-30 A.M.

There were present: Messrs. W. M. Wiggins (England), President, in the Chair, Dr. H. van Delden (Germany), Vice-President, G. Willems, R. Henen (Belgium), Ing. O. Pick (Czecho-Slovakia), Dr. E. Zucker (Czecho-Slovakia and Yugo-Slavia), His Excellency Fouad Pasha Abaza (Egypt), F. Holroyd (England), J. Le Blan, R. A. de la Beaumelle (France), Dr. W. Böhm (Germany), J. Gelderman (Holland), Comm. A. Tobler, Comm. G. D. Delfino (Italy), Y. Ito (Japan), C. Jenny (Switzerland), A. S. Pearse, Expert Adviser, N. S. Pearse, General Secretary, J. Pogson, Jr., Assistant Secretary.

MINUTES OF PREVIOUS MEETINGS.

The Minutes of the previous Meetings having been circulated were taken as read and duly confirmed.

THE PRESIDENT reported that Mr. Fred Mills, the Junior Vice-President, had regretfully been compelled to resign from the Committee on account of ill-health in his family.

It was decided to send a letter to Mr. Mills thanking him for the valuable services he had rendered and extending to him every good wish for the future health of Mrs. Mills.

Mr. WIGGINS stated that the English Federation had appointed Mr. H. S. Butterworth to serve on the International Cotton Committee in his place.

FALSE PACKING OF AMERICAN COTTON.

The General Secretary read a letter from Mr. J. Pogson in which it was stated that during the course of the International Textile Tripartite Technical Conference held in Washington, members of the International Cotton Committee attending that Conference interviewed officials of the Department of Agriculture, following up the visit made in 1936 by Mr. Wiggins, President of the International Cotton Federation.

The deputation consisted of Messrs. R. Brasseur (Belgium), P. Schlumberger (France), T. Ashurst and J. Pogson (England).

During these interviews Mr. Secretary Wallace referred to the technical difficulties which stood in the way of establishing a Joint American Cotton Committee similar to the Joint Egyptian Cotton Committee.

Mr. Secretary Wallace was entirely sympathetic to the points of view raised by the deputation in regard to false packed cotton, and he stated that in lieu of the formation of a Joint American Cotton Committee a liaison arrangement would be made between the Department of Agriculture and the spinners of American cotton in Europe, in so far as Mr. Fred Taylor would return to Manchester in advance of the new crop movement to continue the work which was begun in 1936.

Although definite plans could not be made so far in the future, Mr. Wallace stated that it may be possible to continue a similar arrangement for some years to come. He indicated that the Department of Agriculture and the Agricultural Attaché at the American Embassy in London were at all times glad to serve as a clearing house through which contact between the spinners and the American Government may be kept up.

Mr. Fred Taylor has made a tour of the cotton growing States for the purpose of placing the facts he gathered from the cotton spinning mills in Europe, upon the nature and seriousness of these complaints, before farmers, ginnermen and others concerned.

EGYPTIAN COTTON CONGRESS, 1938.

His Excellency FOUAD PASHA ABAZA explained the programme of the International Cotton Congress, which is to be held in Egypt next January.* The excursion to Upper Egypt was entirely optional.

The members of the International Cotton Committee asked whether it would not be possible for the opening day of the Congress to be postponed from the 26th to the 27th January, due to the fact that a

*See page 476.

number of ships are scheduled to arrive in Alexandria actually on the 26th.*

For the purposes of preparation, the Organising Committee of the Congress would like to have some idea before the 1st September of the probable numbers attending from each country.

For this reason Affiliated Associations are asked to return to the Head Office the number of delegates likely to attend the Congress before the 15th August next.

Subjects suggested for discussion by the Egyptian Section were decided upon as follows :—

- (1) New Uses for Cotton.
- (2) The spinning and manufacturing of Staple Fibre and Artificial Silk.
- (3) Cotton Growing in Egypt.
- (4) Cotton Seed Control.
- (5) Control of Gins.
- (6) Mixing Laws.
- (7) Alteration to Humidity Agreement.

The following subjects were suggested by the Spinners :—

- (1) 'The Forty Hours' Working Week and its probable effect upon the Cotton Industry.
- (2) Social Legislation in the Cotton Industry.
- (3) The Preparation of Substitutes for Raw Cotton and their relative spinning values.
- (4) The spinning of Staple Fibre.
- (5) Development and Possibilities of new cotton growing areas.
- (6) The Cotton Export Business of the United States and its Prospects.

FORTY HOURS' WORKING WEEK IN THE TEXTILE INDUSTRY.

In the absence of members of the International Cotton Committee who formed part of the delegation which attended the International Labour Office Tripartite Conference in Washington, the General Secretary read a report on the above subject prepared by Messrs. T. Ashurst and J. Pogson.

STANDARDIZATION AND UNIFICATION OF TEXTILE TERMS AND TESTING METHODS.

The Committee recommended the adoption by Affiliated Associations of the "Z" and "S" definitions for twist in single and doubled yarns, as proposed by the International Standards Association, subject to certain amendments proposed by the German Association.

Regarding the adoption of equivalent counts, it was decided to leave this matter for further discussion at the next Meeting of the Inter-

* The Egyptian Organising Committee have indicated that the proposed change of date would seriously interfere with the arrangements as planned, and up to the time of going to press no alteration in the date has been made.

national Cotton Committee, when such details might be gone into more fully after due study by the Affiliated Associations.

Each Association ratifying the Committee's action in regard to this question should inform the General Secretary as soon as possible.

FOREIGN MATTER IN INDIAN COTTON.

The PRESIDENT stated that this matter was not raised with the object of finding any fault with the quality of Indian cotton but with an earnest endeavour to co-operate with the Indian Central Cotton Committee in the valuable work which that Organisation had done and was doing towards improving the quality of the Indian crop.

Complaints had been received from time to time and there appeared to be a considerable amount of dissatisfaction, especially among continental spinners, as regards impurities, such as leather belting, sticks, stones, pieces of cloth, etc., found in Indian cotton. Another cause of complaint was the method of marking the bales. At one time it was possible to trace a bale back to the gin owing to the method of stamping each hoop of the bale with an identification mark, but the law regarding the stamping of the press mark on the hoop has been repealed and it is now only necessary to stencil the press mark on the sacking.

After due consideration of the situation, the Committee finally adopted the following resolution :—

“ This Committee of the International Federation of Master Cotton Spinners' and Manufacturers' Associations appreciates the efforts which are being made by the Indian Central Cotton Committee to improve the standard of the Indian Cotton crop. It is, however, strongly of the opinion that the practice of stamping identification marks on the bale hoops should be resumed at once, in order that complaints of foreign matter in the cotton, which are constantly being made by spinners, may be traced to their source. Where the press mark is merely stencilled on the hessian cover, the mark may possibly be cut out in the process of sampling. This Committee, therefore, recommends the Indian Central Cotton Committee to urge for this most necessary reform.”

APPOINTMENT OF PRESIDENT AND VICE-PRESIDENTS.

On the motion of Mr. W. M. Wiggins, Dr. H. van Delden (Germany) was unanimously elected President of the International Cotton Federation.

It was unanimously resolved that Mr. W. H. Catterall (England) should be Senior Vice-President, and Comm. A. Tobler (Italy), Junior Vice-President of the International Cotton Federation.

THE USE OF SISAL IN BALING OF COTTON.

Following the complaint of a Belgian firm of cotton importers regarding the presence of white-sisal fibres in bales of American cotton,

a similar complaint had been received from one of the Affiliated Associations objecting to the use of sisal string in baling cotton.

After considerable discussion, the following resolution was adopted :—

“ It is essential that no sisal be used in the baling of cotton either as a covering or as a string. In the opinion of the International Committee of Cotton Spinners and Manufacturers, cotton string should be used in place of sisal string.”

It was decided to send the resolution to the United States Department of Agriculture and to United States cotton ginner and exporters.

During the course of the discussion it was pointed out that when the bale was compressed the string tying the sacking on the open side of the bale was forced into the cotton and the sisal fibres became intermixed with the cotton and were the cause of broken yarn ends in the spinning room.

DATE AND PLACE OF NEXT MEETING.

It was decided on the invitation of the French Association to hold the next Meeting of the Committee in Paris on the 27th and 28th September, 1937.

The General Secretary reported the receipt of a letter from the Italian Association conveying an invitation to the Committee to hold another Meeting in that country.

The Committee expressed their thanks to the Italian Association and provisionally decided that the Meeting following the holding of the Egyptian Cotton Congress should be held in Italy. This would probably take place during May, 1938. The date to be fixed later.

VISIT OF THE GENERAL SECRETARY TO AMERICA.

The International Cotton Committee decided to send the General Secretary, Mr. Norman S. Pearse, to America, with the object of touring the United States cotton belt during the coming crop season.

COTTON PROGRESS IN BRAZIL

Attention is drawn to the Federation's latest public appeared recently. Further particulars will be found on this Bulletin.

PROVISIONAL PROGRAMME

FOR THE

XVIII

International Cotton Congress

CAIRO—ALEXANDRIA

JAN.-FEB, 1938

CAIRO:

WEDNESDAY, January 26th.

- Morning.* (1) Sign Names at Palace.
(2) Joint Egyptian Cotton Committee Meeting with Prime Minister and Minister of Agriculture at Opera before Inauguration.
(3) Official Inauguration: Opera House.
- Afternoon.* Joint Egyptian Cotton Committee Meeting and International Cotton Committee Meeting.
- Evening.* Official Banquet.

THURSDAY, January 27th.

- Morning.* Congress Meeting: Agricultural Museum Fouad I, Doqqi.
- Afternoon.* (1) Visit Cotton Research Board and Spinning Test Mill at Giza.
(2) Tea offered by Ministry of Agriculture.
- Evening.* Free.

FRIDAY, January 28th.

- Morning.* Congress Meeting: Agricultural Museum Fouad I, Doqqi.
- Afternoon.* (1) Congress Meeting: Royal Agricultural Society, Ghezireh.
(2) Visit Cotton Museum of Royal Agricultural Society.
(3) Tea offered by Royal Agricultural Society.
- Evening.* Banquet.

SATURDAY, January 29th.

- Morning.* Free.
- Afternoon.* Visit to Pyramids : New Excavations or Sakkara.
- Evening.* Free.

SUNDAY, January 30th.

- Morning.* Visit to Sids : Government Experimental Farm.
- Afternoon.* Visit to Ginning Factory in Upper Egypt and return by Nile Steamer, if possible.
- Evening.* Free.

MONDAY, January 31st.

- Morning.* Congress Meeting : Agricultural Museum Fouad I, Doqqi.
- Afternoon.* Visit to Cairo Museum of Antiquities.
- Evening.* Banquet.

TUESDAY, February 1st.

- Morning.* Meeting of Representatives of Testing Houses.
- Afternoon.* (1) Congress Meeting : Agricultural Museum Fouad I, for submission resolutions.
(2) Visit to Agricultural Museum Fouad I.
(3) Tea offered by Ministry of Agriculture.
- Evening.* Depart for Alexandria.

ALEXANDRIA:**WEDNESDAY, February 2nd.**

- Morning.* Meeting of Congress.
- Afternoon.* Tea.
- Evening.* Free.

THURSDAY, February 3rd.

- Morning.* Visits to Presses—Minet-el-Bassal, Alexandria
Testing House.
- Afternoon.* Meeting of Congress (for Humidity resolutions).
- Evening.* Banquet.

FRIDAY, February 4th.

- Morning.* In Alexandria.
- Afternoon.* Depart for Cairo.
- Evening.* Leave Cairo for Luxor-Aswan.

LUXOR:**SATURDAY, February 5th.**

In Luxor.

SUNDAY, February 6th.

In Luxor.

MONDAY, February 7th.

Leave for Aswan.

ASWAN:**TUESDAY, February 8th.**

In Aswan.

WEDNESDAY, February 9th.

- Morning.* In Aswan.
- Afternoon.* Leave Aswan, arrive Luxor.
- Evening.* Leave Luxor for Cairo.

CAIRO:**THURSDAY, February 10th.**

Morning. Arrive Cairo, leave for Alexandria.

Afternoon. Departure.

N.B.—Members are requested to bring with them their respective decorations.

ESTIMATED COST OF JOURNEY.

Arrangements have already been made with the hotels in Egypt, certain Continental railways and certain steamship companies for considerable reduction in fares and accommodation.

Steamship fares have been reduced by approximately 50 per cent. to bona fides Congress delegates and members of their families. It is estimated that the cost from London to London, inclusive of all railway travelling, steamship fares and hotel accommodation in Egypt will approximate £100.

For those delegates who do not participate in the Nile excursion to Luxor and Aswan, the cost will be decreased by approximately £15.

Prospective delegates should inform their national Association at the earliest possible date of their intended participation in this Congress, as the Egyptian Organisation Committee is anxious to have some idea of the probable number of delegates.

SUGGESTED ITINERARIES FOR THE INTERNATIONAL COTTON CONGRESS EGYPT

JANUARY-FEBRUARY, 1938

(Compiled by Messrs. Cox and Kings, 13 Regent Street, Pall Mall, London, S.W.1, representing the Mistr Shipping Co.), Joint Official Travel Agents for the Congress.

It should be borne in mind that all rates quoted in these itineraries are based on current rates of exchange and are subject to fluctuation.

ITINERARY "A"

(Including Upper Egypt, and travelling by s.s. "EL NIL" in both directions. All inclusive rate £94 10s. od. for the accommodation as specified.

For list of extras see page 483.

Date : January, 1938.

Duration : Thirty days.

JANUARY 18th.	Depart London (Victoria Station) via Dover, Calais, Paris	11-00 a.m.
JANUARY 19th.	Arrive Marseilles	7-00 a.m.
	Depart s.s. "EL NIL"	1-00 p.m.
JANUARY 20th.	Arrive s.s. "EL NIL," Genoa	7-00 a.m.
	Depart s.s. "EL NIL," Genoa	1-30 p.m.
JANUARY 24th.	Arrive s.s. "EL NIL," Alexandria	5-00 p.m.
	Leave by train for Cairo	7-00 p.m.
	Arrive Cairo	10-20 p.m.
	Transfer to hotel.	
JANUARY 25th.	Free in Cairo.	
JANUARY 26th to FEBRUARY 9th.	} As per Official Programme.*	
FEBRUARY 10th.		
	Arrive Cairo	7-30 a.m.
	Depart Cairo	8-00 a.m.
	Arrive Alexandria	10-40 a.m.
	Depart Alexandria per s.s. "EL NIL"	Noon
FEBRUARY 14th.	Arrive Genoa, s.s. "EL NIL"	1-30 p.m.
FEBRUARY 15th.	Arrive Marseilles, s.s. "EL NIL"	1-00 p.m.
	Depart Marseilles, by train	7-50 p.m.
FEBRUARY 16th.	Arrive London (Victoria Station)	3-21 p.m.

NOTE.—Passengers wishing to join and leave the s.s. "EL NIL" at Genoa, thus saving a day in each direction, can do so at a supplementary charge of £3 os. od.

This Tour covers :—

First-class rails between London and Marseilles, with sleeper accommodation between Paris and Marseilles, in both directions.

All passenger and hand baggage transfers at Dover, Calais, Paris, Marseilles, Alexandria and Cairo.

Meals on trains and Gratuities to Sleeping Car Attendants.

First-class return steamer accommodation on s.s. "EL NIL."

First-class rails and reservations in Egypt.

Hotel accommodation at Continental Hotel, Cairo; and at Alexandria, Luxor and Assuan.

Excursions in Upper Egypt.

NOT INCLUDED.

Charges for Registered and Excess Baggage.

Beverages on trains, steamers and hotels.

Gratuities on steamers, and in hotels.

Laundry charges.

All passengers must be in possession of up-to-date Passports, duly endorsed for Egypt, and bearing an Egyptian visa.

* See pages 476-478.

ITINERARY "B"

(Alexandria and Cairo only, travelling by s.s. "EL NIL" outward and returning by s.s. "MARCO POLO" to Venice.)

All inclusive rate £75 12s. od. for the accommodation as specified.

For list of extras, see page 483.

Date : January, 1938.

Duration : Twenty-three days.

JANUARY 18th.	Depart London (Victoria Station)	11-00 a.m.
JANUARY 19th.	Arrive Marseilles	7-00 a.m.
	Depart s.s. "EL NIL"	1-00 p.m.
JANUARY 20th.	Arrive s.s. "EL NIL," Genoa	7-00 a.m.
	Depart s.s. "EL NIL," Genoa	1-30 p.m.
JANUARY 24th.	Arrive s.s. "EL NIL," Alexandria	5-00 p.m.
	Leave by train for Cairo	7-00 p.m.
	Arrive Cairo	10-20 p.m.
	Transfer to hotel.	
JANUARY 25th.	Free in Cairo.	
JANUARY 26th	} As per Official Programme.*	
to		
FEBRUARY 3rd.		
FEBRUARY 4th.	Free in Alexandria.	
FEBRUARY 5th.	Depart by s.s. "MARCO POLO"	2-00 p.m.
FEBRUARY 6th.	At Sea.	
FEBRUARY 7th.	At Sea.	
FEBRUARY 8th.	Arrive Venice	1-00 p.m.
	Depart Venice by Simplon-Orient Express	3-00 p.m.
FEBRUARY 9th.	Arrive London (Victoria Station)	5-20 p.m.

NOTE.—Passengers wishing to join the s.s. "EL NIL" at Genoa can save a day on the outward journey at a supplementary charge of £1 10s. od.

This Tour covers :—

First-class rails between London-Marseilles, and Venice-London, with sleepers in each direction.

All passenger and hand baggage transfers at Dover, Calais, Paris, Marseilles, Alexandria, Cairo, Venice, Boulogne, Folkestone.

Meals on trains and gratuities to Sleeping Car Attendants.

First-class accommodation on s.s. "EL NIL" and s.s. "MARCO POLO."

First-class rails and reservations in Egypt.

Accommodation and meals at Continental Hotel in Cairo, and at Alexandria.

NOT INCLUDED.

Charges for Registered and Excess Baggage.

Beverages on trains, steamers and hotels.

Gratuities on steamers and in hotels.

Laundry charges.

All passengers must be in possession of up-to-date Passports, duly endorsed for Egypt, and bearing an Egyptian visa.

* See pages 476-478.

ITINERARY "C"

(Including Upper Egypt, and travelling by Italian Steamer in both directions.)

All-inclusive rate £99 15s. od. for the accommodation as specified.

For list of extras, see page 483.

Date : January, 1938.

Duration : Twenty-eight days.

JANUARY 21st.	Depart London (Victoria Station)	..	2-00 p.m.
JANUARY 22nd.	Arrive Genoa (Rome Express)	.. ..	1-00 p.m.
	Embark s.s. " ESPERIA "	.. ..	3-00 p.m.
JANUARY 23rd.	At Sea.		
JANUARY 24th.	At Sea.		
JANUARY 25th.	At Sea.		
JANUARY 26th.	Arrive Alexandria	.. ..	7-00 a.m.
	Depart for Cairo	.. ..	7-30 or 9-00 a.m.
	Arrive Cairo	.. ..	10-10 or 12-10 a.m.
JANUARY 26th to	} As per Official Programme.*		
FEBRUARY 9th.			
FEBRUARY 10th.	Free in Cairo or Alexandria.		
FEBRUARY 11th.	Free in Cairo or Alexandria.		
FEBRUARY 12th.	Embark on s.s. " ESPERIA " (Alexandria)		2-00 p.m.
FEBRUARY 13th.	At Sea.		
FEBRUARY 14th.	At Sea.		
FEBRUARY 15th.	At Sea.		
FEBRUARY 16th.	Arrive Genoa	.. ..	8-00 a.m.
	Depart Genoa (Rome Express)	.. ..	6-57 p.m.
FEBRUARY 17th.	Arrive London	.. ..	5-21 p.m.

The above Tour covers :—

First-class return rails between London and Genoa, with sleeping accommodation in each direction.

All passenger and hand baggage transfers at Dover, Calais, Paris, Genoa, Alexandria and Cairo.

Meals on trains and gratuities to Sleeping Car Attendants.

First-class return accommodation on s.s. " ESPERIA."

First-class rails and reservations in Egypt.

Accommodation and meals at Continental Hotel, Cairo ; and at Alexandria, Luxor and Assuan.

Excursions in Upper Egypt.

NOT INCLUDED.

Charges for Registered and Excess Baggage.

Beverages on trains, steamers and hotels.

Gratuities on steamers and in hotels.

Laundry charges.

All passengers must be in possession of up-to-date Passports, duly endorsed for Egypt, and bearing an Egyptian visa.

*See pages 476-478.

ITINERARY "D"

(Alexandria and Cairo only, travelling by s.s. "ESPERIA" outward and s.s. "MARCO POLO" homeward.)

All-inclusive rate £78 15s. od. for the accommodation as specified.

For list of extras, see below.

Date : January, 1938.

Duration : Twenty days.

JANUARY 21st	Depart London (Victoria Station)	..	2-00	p.m.
JANUARY 22nd.	Arrive Genoa (Rome Express)	..	1-00	p.m.
	Embark s.s. "ESPERIA"	..	3-00	p.m.
JANUARY 23rd.	At Sea.			
JANUARY 24th.	At Sea.			
JANUARY 25th.	At Sea.			
JANUARY 26th.	Arrive Alexandria	..	7-00	a.m.
	Depart for Cairo	..	7-30 or 9-0	a.m.
	Arrive Cairo	..	10-10 or 12-10	a.m.
JANUARY 26th	} As per Official Programme.*			
to				
FEBRUARY 3rd.	Free in Alexandria.			
FEBRUARY 4th.	Depart by s.s. "MARCO POLO"	..	2-00	p.m.
FEBRUARY 5th.	At Sea.			
FEBRUARY 6th.	At Sea.			
FEBRUARY 7th.	Arrive Venice	..	1-00	p.m.
FEBRUARY 8th.	Depart Venice by Simplon-Orient Express		3-00	p.m.
FEBRUARY 9th.	Arrive London (Victoria Station)	..	5-20	p.m.

The above Tour covers :—

First-class rails between London—Genoa—Venice—London, with sleepers in each direction.

All passenger and hand baggage transfers at Dover, Calais, Paris, Genoa, Alexandria, Cairo, Venice, Boulogne and Folkestone.

Meals in trains and gratuities to Sleeping Car Attendants.

First-class accommodation on s.s. "ESPERIA" and s.s. "MARCO POLO."

First-class rails and reservations in Egypt.

Accommodation and meals at Hotel Continental in Cairo and at Alexandria.

NOT INCLUDED.

Charges for Registered and Excess Baggage.

Beverages on trains, steamers and hotels.

Gratuities on steamers, and in hotels.

Laundry charges.

All passengers must be in possession of up-to-date Passports, duly endorsed for Egypt, and bearing an Egyptian visa.

EXTRAS

STEAMER SUPPLEMENTS.

Single Cabin, "EL NIL"	..	£1 each way
De Luxe—Bath	..	£4 each way
Single and de Luxe Cabin Italian Steamer	..	(To be arranged)

HOTEL SUPPLEMENTS.

<i>Itineraries "A" and "C."</i>		Double and single rooms per Person	Supplement for private bathroom per room
Continental Hotel and Mena House	..	—	£5 5 0
Shepherd's..	..	£5 5 0	£10 10 0
Semiramis	..	£10 10 0	£21 0 0
<i>Itineraries "B" and "D."</i>			
Continental Hotel and Mena House	..	—	£3 3 0
Shepherd's..	..	£3 3 0	£6 6 0
Semiramis	..	£6 6 0	£12 12 0

These prices are for the whole of the duration of the stay, as set out in the Official Programme.

* See pages 476-478.

SUGGESTED ITINERARIES
FOR THE
INTERNATIONAL COTTON CONGRESS
EGYPT

JANUARY-FEBRUARY, 1938

(Compiled by Messrs. Thos. Cook & Son Ltd., Joint Official Travel
Agents for the Congress.)

ITINERARY No. 1

Travelling by Misr Line s.s. "EL NIL" and including visit to Upper Egypt.

ALL-INCLUSIVE RATE EACH PASSENGER

Hotel in Cairo* :	Without Private Bathroom		With Private Bathroom †	
	Single Room	Two-Bedded Room	Single Room	Two-Bedded Room
Continental ..	£84 1 0	£82 18 6	£85 17 0	£84 1 0
Shepherd's ..	£85 17 0	£84 19 0	£89 9 0	£87 13 0
Semiramis ..	£88 14 0	£87 16 0	£93 4 0	£90 19 0

JANUARY 18th.	Depart London (Victoria Station) ..	11-00 a.m.
	via Dover	
	Depart Calais Maritime by Mediterranean	
	Express Train de Luxe	2-30 p.m.
JANUARY 19th.	Arrive Marseilles	7-00 a.m.
20th.	Depart Marseilles by s.s. "EL NIL" ..	1-00 p.m.
JANUARY 21st.	Call at Genoa. Depart Genoa	1-30 p.m.
JANUARY 24th.	Arrive Alexandria	5-00 p.m.
	and continue by train to Cairo.	
JANUARY 25th.	At leisure in Cairo.	
JANUARY 26th	{ Attending Congress in accordance with Official Programme (including visit to Upper Egypt) †	
to		
FEBRUARY 9th.	Leave Cairo by morning train for Alexan-	
FEBRUARY 10th	dria and embark on s.s. "EL NIL"	
	sailing at noon.	
FEBRUARY 14th	Arrive Genoa	1-30 p.m.
FEBRUARY 15th.	Arrive Marseilles	1-00 p.m.
	Depart Marseilles (Sleeping Car) ..	7-50 p.m.
FEBRUARY 16th.	Arrive Paris (Lyon)	7-25 a.m.
	Transfer to Gare du Nord.	
	Depart Paris (Nord)	8-20 a.m.
	via Calais-Dover.	
	Arrive London (Victoria Station) ..	3-21 p.m.

* Rooms at the hotels in Alexandria, Luxor and Aswan will be allotted according to the accommodation available.

† See pages 476-478.

‡ In Cairo only.

ITINERARY No. 1—*continued*

The Rate includes :—

1. First-class travel tickets. (See footnote "Steamer Accommodation.")
2. Reserved seats on trains.
3. First-class sleeping berths Calais-Marseilles : Cairo-Luxor and return : Marseilles-Paris, including gratuities.
4. Meals en route including gratuities for service.
5. Landing and embarking charges at Alexandria.
6. Hotel accommodation in Egypt for the periods covered in the itinerary consisting of plain breakfast, table d'hôte luncheon and dinner, and bedroom with or without private bathroom.
7. Gratuities to hotel servants.
8. Transfer of passengers and baggage between stations, steamers and hotels.
9. Sightseeing at Luxor and Aswan.
10. General services of Cook/Wagons-Lits uniformed representatives at the principal points en route.

The Fare does not include portorage, charges for registered baggage, gratuities to steamer stewards, nor beverages.

Embarkation at Genoa : Passengers may embark on s.s. "EL NIL" and disembark at Genoa instead of Marseilles, thus saving a day in each direction. Details of train services and adjustment of fare will be furnished to those preferring this route.

Steamer Accommodation : The fares quoted are based on first class berths at the minimum rate on Mediterranean steamers. Superior accommodation can be reserved and details of cabins available and supplementary charges will be given on request.

Passports : Passengers must be in possession of valid passports with endorsements embracing France and Egypt and bearing an Egyptian visa. Full information will be supplied on application.

ITINERARY No. 2

Travelling to Egypt by Misr Line s.s. "EL NIL" and returning by Italian s.s. "MARCO POLO," Alexandria and Cairo only.

ALL-INCLUSIVE RATE EACH PASSENGER

Hotel in Cairo* :	Without Private Bathroom		With Private Bathroom†	
	Single Room	Two-Bedded Room	Single Room	Two-Bedded Room
Continental ..	£73 1 0	£71 19 0	£74 17 0	£73 1 0
Shepherd's ..	£75 1 0	£74 3 0	£78 13 0	£76 17 0
Semiramis ..	£78 1 0	£77 3 0	£82 11 0	£80 6 0

* Rooms at the hotels in Alexandria will be allotted according to the accommodation available.

† In Cairo only.

ITINERARY No. 2—continued

JANUARY 18th.	Depart London (Victoria Station) ..	11-00 a.m.
	via Dover.	
	Depart Calais Maritime by Mediterranean Express Train de Luxe	2-30 p.m.
JANUARY 19th.	Arrive Marseilles	7-00 a.m.
	Depart Marseilles by s.s. "EL NIL" ..	1-00 p.m.
JANUARY 20th.	Arrive at Genoa	7-00 a.m.
	Depart Genoa	1-30 p.m.
JANUARY 24th.	Arrive Alexandria	5-00 p.m.
	and continue by train to Cairo.	
JANUARY 25th.	At leisure in Cairo.	
JANUARY 26th	} Attending Congress in accordance with Official Programme.*	
to		
FEBRUARY 3rd.		
FEBRUARY 4th.	At leisure in Alexandria.	
FEBRUARY 5th.	Depart Alexandria by Adriatica Line s.s. "MARCO POLO."	2-00 p.m.
FEBRUARY 8th.	Arrive Venice	1-00 p.m.
	Depart Venice by Orient-Simplon Express	3-02 p.m.
FEBRUARY 9th.	Arrive Boulogne	1-30 p.m.
	Depart Boulogne	1-50 p.m.
	via Folkestone.	
	Arrive London (Victoria Station) ..	5-20 p.m.

The Rate includes :—

1. First-class travel tickets. (See footnote "Steamer Accommodation.")
2. Reserved seats on trains.
3. First-class sleeping berths Calais-Marseilles and Venice-Boulogne, including gratuities.
4. Meals en route including gratuities for service.
5. Landing and Embarking charges at Alexandria.
6. Hotel accommodation in Egypt for the periods covered in the itinerary consisting of plain breakfast, table d'hôte luncheon and dinner, and bedroom with or without private bathroom.
7. Gratuities to hotel servants.
8. Transfer of passengers and baggage between stations, steamers and hotels.
9. General services of Cook/Wagons-Lits uniformed representatives at the principal points en route.

The Fare does not include portorage, charges for registered baggage, gratuities to steamer stewards, nor beverages.

Embarkation at Genoa : Passengers may embark on s.s. "EL NIL" at Genoa instead of Marseilles and thus save one day. Details of train services and adjustment of fare will be furnished to those preferring this route.

Steamer Accommodation : The fares quoted are based on first class berths at the minimum rate on Mediterranean steamers. Superior accommodation can be reserved and details of cabins available and supplementary charges will be given on request.

Passports : Passengers must be in possession of valid passports with endorsements embracing France, Egypt, Italy and Switzerland and bearing an Egyptian visa. Full information will be supplied on application.

* See pages 476-478.

ITINERARY No. 3

(Travelling by Adriatica Line s.s. "ESPERIA" and including visit to Upper Egypt.)

ALL-INCLUSIVE RATE EACH PASSENGER

Hotel in Cairo*	Without Private Bathroom		With Private Bathroom †	
	Single Room	Two-bedded Room	Single Room	Two-bedded Room
Continental ..	£87 11 0	£86 8 0	£89 7 0	£87 11 0
Shepherd's ..	£89 13 0	£88 15 0	£93 5 0	£91 9 0
Semiramis ..	£92 18 0	£92 0 0	£97 8 0	£95 3 0

JANUARY 21st.	Depart London (Victoria Station) via Dover	11-00 a.m.
	Depart Calais Maritime by Rome Express Train de Luxe	2-30 p.m.
JANUARY 22nd.	Arrive Genoa	9-18 a.m.
	Depart Genoa by s.s. "ESPERIA"	3-00 p.m.
JANUARY 26th.	Arrive Alexandria	7-00 a.m.
	and proceed by special train to Cairo	
JANUARY 26th. to FEBRUARY 9th.	Attending Congress in accordance with Official Programme (including visit to Upper Egypt)†	
FEBRUARY 10th.	At leisure in Cairo.	
FEBRUARY 11th.	At leisure in Cairo.	
FEBRUARY 12th.	Proceed by train to Alexandria and leave by s.s. "ESPERIA"	2-00 p.m.
FEBRUARY 16th.	Arrive Genoa	8-00 a.m.
	Depart Genoa by Rome Express Train de Luxe	6-57 p.m.
FEBRUARY 17th.	Arrive Boulogne	1-30 p.m.
	Depart Boulogne via Folkestone	1-50 p.m.
	Arrive London (Victoria Station)	5-20 p.m.

The Rate includes :—

1. First-class travel tickets. (See footnote "Steamer Accommodation.")
2. Reserved seats on trains.
3. First-class sleeping berths Calais-Genoa : Cairo-Luxor and return : Genoa-Boulogne, including gratuities.
4. Meals en route including gratuities for service.
5. Landing and Embarking charges at Alexandria.
6. Hotel accommodation in Egypt for the periods covered in the itinerary consisting of plain breakfast, table d'hôte luncheon and dinner and bedroom with or without private bathroom.
7. Gratuities to hotel servants.
8. Transfer of passengers and baggage between stations, steamers and hotels.
9. Sight-seeing at Luxor and Aswan.
10. General services of Cook/Wagon-Lits uniformed representatives at the principal points en route.

* Rooms at the Hotels in Alexandria, Luxor and Aswan will be allotted according to the accommodation available.

† See pages 476-478.

‡ In Cairo only.

ITINERARY No. 3—*continued*

The Fare does not include portorage, charges for registered baggage, gratuities to steamer stewards, nor beverages.

Steamer accommodation : The fares quoted are based on first-class berths at the minimum rate on Mediterranean steamers. Superior accommodation can be reserved and details of cabins available and supplementary charges will be given on request.

Passports : Passengers must be in possession of valid passports with endorsements embracing France, Italy and Egypt, and bearing an Egyptian visa. Full information will be supplied on application.

ITINERARY No. 4

(Travelling by Adriatica Steamers in both directions. Alexandria and Cairo only.)

ALL-INCLUSIVE RATE EACH PASSENGER

Hotel in Cairo*	Without Private Bathroom		With Private Bathroom †	
	Single Room	Two-bedded Room	Single Room	Two-bedded Room
Continental ..	£70 15 0	£69 18 0	£72 2 0	£70 15 0
Shepherd's ..	£72 6 0	£71 12 0	£75 0 0	£73 13 0
Semiramis ..	£74 12 0	£73 19 0	£78 0 0	£76 6 0

JANUARY 21st.	Depart London (Victoria Station) via Dover	11-00 a.m.
	Depart Calais Maritime by Rome Express Train de Luxe	2-30 p.m.
JANUARY 22nd.	Arrive Genoa	9-18 a.m.
	Depart Genoa by s.s. " ESPERIA " ..	3-00 p.m.
JANUARY 26th.	Arrive Alexandria and proceed by special train to Cairo	7-00 a.m.
JANUARY 26th to FEBRUARY 3rd.	} Attending Congress in accordance with Official Programme † At leisure in Alexandria. Depart Alexandria by s.s. " MARCO POLO "	2.00 p.m.
FEBRUARY 4th.		1-00 p.m.
FEBRUARY 5th.		3-02 p.m.
		1-30 p.m.
FEBRUARY 8th.	Arrive Venice	1-50 p.m.
	Depart Venice by Orient-Simplon Express	5-20 p.m.
FEBRUARY 9th.	Arrive Boulogne	
	Depart Boulogne via Folkestone	
	Arrive London (Victoria Station)	

* Rooms at the Hotels in Alexandria will be allotted according to the accommodation available.

† See pages 476-478.

† In Cairo only.

ITINERARY No. 4—*continued**The Rate Includes :—*

1. First-class travel tickets. (See footnote "Steamer Accommodation.")
2. Reserved seats on trains.
3. First-class sleeping berths Calais-Genoa and Venice-Boulogne, including gratuities.
4. Meals en route, including gratuities for service.
5. Landing and Embarking charges at Alexandria.
6. Hotel accommodation in Egypt for the periods covered in the itinerary consisting of plain breakfast, table d'hôte luncheon and dinner, and bedroom with or without private bathroom.
7. Gratuities to hotel servants.
8. Transfer of passengers and baggage between stations, steamers and hotels.
9. General services of Cook/Wagons-Lits uniformed representatives at the principal points en route.

The fare does not include portorage, charges for registered baggage, gratuities to steamer stewards, nor beverages.

Steamer accommodation : The fares quoted are based on first-class berths at the minimum rate on Mediterranean steamers. Superior accommodation can be reserved and details of cabins available and supplementary charges will be given on request.

Passports: Passengers must be in possession of valid passports with endorsements embracing France, Italy, Egypt and Switzerland, and bearing an Egyptian visa. Full information will be supplied on application.

INTERNATIONAL COTTON CONGRESS—CAIRO

JANUARY 26th—FEBRUARY 10th, 1938.

List of specially reduced terms offered to delegates and members of their families by hotels in Cairo.

NAME OF HOTEL	PRICE OF ROOMS (Inclusive of meals)				PRICE OF ROOMS (Not including meals)				PRICE OF MEALS		
	Single room (P.T. per day)	Two-bedded room (P.T. per day)	Single room with bath (P.T. per day)	Two-bedded room with bath (P.T. per day)	Single room (P.T. per day)	Two-bedded room (P.T. per day)	Single room with bath (P.T. per day)	Two-bedded room with bath (P.T. per day)	Break-fast	Lunch	Dinner
SEMIRAMIS (on the banks of the Nile)	150	280	200	350	70	140	150	250	18	45	50
SHEPHEARD'S (In the city)	120	220	160	280	60	120	100	180	15	40	45
CONTINENTAL (In the city)	100	175	120	200	50	75	70	100	12	30	40
MENA HOUSE* (Near the Pyramids)	100	175	120	200	40	60	60	90	12	30	40
METRO-POLITAN (In the city)	80	150	80	150	40	80	40	80	10	25	25

*Distance between the Mena House Hotel and Cairo, 15 kilometres. Frequent tramway and hotel bus services.

Duration of journey, 25 minutes.

The £ sterling is equal to P.T. (Piastres) 07·5.



AUSTRIA.

COTTON SPINNING

The state of trade in the Austrian cotton spinning industry in the three months from March to May inclusive was not a favourable one, and the production fell back from 2·78 million kilos in March to 2·5 million kilos in May. In comparison with the theoretical full production (on single shift), the production in the above-mentioned three months' period was 96½-93·8 per cent. These figures apply to the production of yarn, but they do not give a correct picture of the state of trade, inasmuch as new sales have decreased in a considerably larger proportion, which fact will show itself only in the statistics of the succeeding months. While in March the sales were 2·26 mill. kg., they dropped in April to 1·486 mill. and in May to 928·00 kilos. This setback affected both home and export business.

The following are the movements in export trade during the first four months of the current year :

YARN IMPORTS FROM JANUARY 1 TO APRIL 30 IN METRIC QUINTALS

		1937	1936
Grey ..	.. .. .	4,032	6,043
Bleached ..	.. .. .	858	1,024
Dyed ..	.. .. .	1,104	854
		<u>5,994</u>	<u>7,921</u>

The import shows, therefore, a decrease of 1927 metric quintals or 24·3 per cent.

YARN EXPORTS FROM JANUARY 1 TO APRIL 30 IN METRIC QUINTALS

		1937	1936
Grey ..	.. .. .	45,247	48,582
Bleached ..	.. .. .	1,921	1,497
Dyed ..	.. .. .	417	285
		<u>47,585</u>	<u>50,364</u>

The decrease in the export is therefore 2,779 metric quintals or 5½ per cent., and it must be taken into consideration that the export figures shown are the result of the more active sales period in the closing months of the year 1936. Owing to the receding sales since March, 1937, the export figures for the coming months will also show a corresponding decrease.

The deterioration of the state of trade, as shown by the statistics, is explained as regards the home market by the fact that in the most important allied industries, namely, the weaving and knitting mills, the number of orders received was unsatisfactory. There are at present no grounds for anticipating a revival in sales in the near future.

COTTON WEAVING

The 14,300 looms included in the statistics were fully occupied during the last months on the basis of one shift. The work was, however, not evenly divided, as about 4,000 looms were stopped, while approximately as many were run on two shifts. Compared with the preceding year the production has risen from about $7\frac{1}{2}$ to $8\frac{1}{2}$ million metres. In the last months the rate of production was rather on the decline, but there are no statistics available yet. In February of this year an agreement came into force among the cotton weaving mills, which regulates both production and prices. Before then sales at the old prices were made to a rather large extent, so that new business booked during the currency of the agreement has been comparatively small. This circumstance explains certain differences in the production of the various mills. Negotiations are at present being carried on for an extension of the agreement on the basis of new regulations in respect of the production quotas. If these negotiations should not come to a satisfactory conclusion, a considerable lowering of the price level may be anticipated, especially seeing that as a result of the rationalisation carried through during the last years, the capacity of the mills appreciably exceeds the quantity which can be absorbed by the market.

As regards the import of cotton cloths during the first four months of the current year, the official statistics show the following :—

IMPORTS FROM JANUARY 1 TO APRIL 30 IN METRIC QUINTALS

	1937	1936
Grey	7,402	6,742
Bleached	758	462
Dyed	498	416
Printed	489	391
Coloured woven	483	705
	<hr/> 9,630	<hr/> 8,716

The total imports have therefore risen by 914 metric quintals or 10½ per cent.

Of the total quantity imported during the four months' period of 1937 mentioned, 7,553 metric quintals or 78·4 per cent. was destined for the processing (manufacturing) trade and only 2,077 metric quintals or 21·6 per cent. was for import for the home market. As regards the business prospects for the near future as already mentioned, these are dependent on the solution of the questions of organisation now under negotiation. In any case an increase in home consumption is not to be expected, but rather a slight decline.

Wages conditions in the spinning, as well as in the weaving industry have not changed to any extent worth mentioning during the last months.

The original report in German runs as follows :—

BAUMWOLLSPINNEREI

Die Beschäftigungslage der österreichischen Baumwollspinnindustrie war in den 3 Monaten März bis einschliesslich Mai keine günstige und die Produktion ist von 2.78 Mill. kg. im März auf 2.5 Mill. kg. im Mai zurückgegangen. Im Verhältnis zur theoretischen Vollerzeugung (in einfacher Schicht) wurden in der vorgenannten 3 Monatsperiode 96½–93.8% produziert. Die vorangeführten Ziffern betreffen die Garnerzeugung, geben jedoch kein richtiges Bild der Geschäftslage, weil die Neuverkäufe in bedeutend stärkerem Masse zurückgegangen sind, was erst in den statistischen Ausweisen der folgenden Monate zum Ausdruck gelangen wird. Während noch im Monat März 2.26 Mill. kg. verkauft wurden, ist der Absatz im April auf 1.486 Mill. und im Mai auf 928.000 kg. gesunken. Dieser Rückgang betrifft sowohl das Inlands—wie das Exportgeschäft.

Was die Aussenhandelsbewegung betrifft, so hat sich dieselbe während der ersten 4 Monate des 1.J. wie folgt gestaltet :—

GARNEINFUHR IN DER ZEIT VOM JANNER 1. BIS APRIL 30. IN METERZENTNERN

						1937	1936
roh ..	..	..	..	..	..	4,032	6,043
gebleicht ..	..	..	..	..	..	858	1,024
gefärbt ..	..	..	..	..	..	1,104	854
						<u>5,994</u>	<u>7,921</u>

Es ist sohin ein Rückgang der Einfuhr um 1927 q oder 24.3% festzustellen.

GARNAUSFUHR IN DER ZEIT VOM JANNER 1. BIS APRIL 30. IN METERZENTNERN

						1937	1936
roh ..	..	..	..	..	..	45,247	48,582
gebleicht ..	..	..	..	..	..	1,921	1,497
gefärbt ..	..	..	..	..	..	417	285
						<u>47,585</u>	<u>50,364</u>

Sohin beträgt der Rückgang in der Ausfuhr 2779 q. oder 5½%, wobei zu berücksichtigen ist, dass die angeführten Ausfuhrziffern noch auf der lebhafteren Verkaufstätigkeit in den letzten Monaten des Jahres 1936 beruhen. Infolge des rückläufigen Absatzes seit März 1937 werden auch die Exportziffern der kommenden Monate eine entsprechende Verringerung aufweisen.

Die statistisch festgestellte Verschlechterung der Beschäftigungslage ist hinsichtlich des Inlandsmarktes darauf zurückzuführen, dass der Auftragseingang bei den wichtigsten Nachindustriellen d.i. bei den Webereien und Trikotagenfabriken, ein unbefriedigender war. Für eine Wiederbelebung des Absatzes in der nächsten Zeit bestehen dermalen keine Anhaltspunkte.

BAUMWOLLWEBEREI

Die von der Statistik erfassten 14,300 Stühle waren während der letzten Monate auf Grundlage einer Schichte voll beschäftigt. Allerdings hat sich diese Beschäftigung nicht gleichmässig verteilt, da ca. 4,000 Stühle ausser Betrieb waren, während ungefähr ebensoviel in 2 Schichten liefen. Die Produktion ist gegenüber dem Durchschnitt des Vorjahres von ca. $7\frac{1}{2}$ auf $8\frac{1}{2}$ Mill. Meter gestiegen. In den letzten Monaten war die Beschäftigung eher eine rückläufige, doch liegen hierüber statistische Angaben noch nicht vor. Im Februar d.J. ist ein Uebereinkommen der Baumwollwebereien in Kraft getreten, welches die Produktion und die Preisbildung regelt. Vor diesem Termin wurden Verkäufe zu alten Preisen in ziemlich grossem Umfang abgeschlossen, so dass die während der bisherigen Geltungsdauer des Abkommens neu getätigten Geschäfte ein verhältnismässig geringes Ausmass hatten. Auf diesen Umstand ist es auch zurückzuführen, dass sich gewisse Verschiebungen in der Beschäftigungslage der einzelnen Betriebe ergaben. Derzeit wird über eine Verlängerung des Uebereinkommens auf Grundlage geänderter Bestimmungen über die Produktions-Kontingentierung verhandelt. Im Falle diese Verhandlungen zu keinem befriedigendem Abschluss führen sollten, wäre mit einer stärkeren Senkung des Preisniveaus zu rechnen, zumal die Kapazität der Betriebe, im Hinblick auf die während der letzten Jahre durchgeführten Rationalisierungsmassnahmen, die Aufnahmefähigkeit des Marktes sehr erheblich übersteigt.

Was die Einfuhr von Baumwollgeweben während der ersten 4 Monate des lfd. Jahres anbelangt, so zeigt die amtliche Statistik das folgende Bild :—

EINFUHR IN METERZENTNER VOM JANNER 1. BIS APRIL 30.

	1937	1936
roh	7,402	6,742
gebleicht	758	462
gefärbt	498	416
bedruckt	489	391
bunt gewebt	483	705
	<hr/> 9,630	<hr/> 8,716

Sohin ist die Einfuhr um 914 q oder $10\frac{1}{2}\%$ gestiegen.

Von dem Gesamtimport der vorgenannten 4 Monatsperiode entfielen im Jahre 1937...7,553 q. oder 78.4% auf den Veredlungsverkehr und nur...2,077 q. 21.6% auf die Einfuhr für den Inlandsmarkt. Was die Aussichten für die Geschäftsentwicklung der nächsten Zeit betrifft, so sind dieselben, wie schon erwähnt, abhängig von der Lösung der in Behandlung stehenden Organisationsfragen. Jedenfalls ist mit einer Steigerung des Inlandskonsums nicht zu rechnen, sondern eher mit einem leichten Rückgang desselben.

Die Lohnverhältnisse haben sich weder in der Spinn- noch in der Webindustrie während der letzten Monate in nennenswerter Weise geändert.

(Verein der Baumwollspinner und Weber Österreichs, Wien)

BELGIUM.

The state of trade in the Belgian cotton industry has undergone a serious change since our last report was forwarded in April.

In the weaving section, the number of orders taken seems to have diminished considerably and the orders for yarn appear to have fallen off similarly.

However, the degree of activity of the spinning mills remains high, due principally to the large contracts received during the first quarter of the year.

The fall in the price of raw cotton has had its effect upon yarn prices, and this falling tendency is not calculated to influence buyers favourably.

This situation has, moreover, been accentuated still greater by the seasonal slackness which is usually experienced at this period of the year.

Throughout the whole of the cotton industry wages have been increased by 2.75 per cent. by reason of the increase in the cost of living.

The original French text runs as follows :—

Un sérieux changement s'est manifesté dans l'industrie cotonnière belge, depuis l'envoi de notre rapport d'avril.

Les ordres pris par le tissage semblent avoir considérablement diminué et les ordres en filés ont fléchi parallèlement.

L'activité des filatures reste cependant très grande, mais elle est principalement le fait des importants contrats passés au cours du premier trimestre de l'année.

La dépression du marché du coton brut a ses répercussions sur les prix des filés et cette tendance à la baisse n'est pas de nature à influencer favorablement la clientèle. Cette situation est d'ailleurs encore accentuée par le ralentissement saisonnier qui se manifeste généralement à cette époque de l'année.

Dans toute l'industrie cotonnière les salaires ont été augmentés de 2.75% par suite de la hausse du coût de la vie.

(Association Belge des Filateurs de Coton)

CZECHO-SLOVAKIA.

In the first half of 1937 the cotton spinning mills were running on about the same level throughout, approximately at 90 per cent., so that the spindles could not be fully employed. Yarn orders, especially for export, showed a marked falling off in the second quarter, so that a curtailment of the recent production level is to be expected for the near future. The quota arrangements for sales to the home market, which came into force in December last, have had a favourable effect on the sale prices of yarns.

The commercial statistics for the first quarters of 1936 and 1937 show the following :—

				First Quarter	
				1937	1936
				quintals	quintals
Import :	Cotton yarns	..	..	6,301	4,563
	Cotton goods	..	..	5,679	2,480
				<hr/> 11,980	<hr/> 7,043
Export :	Cotton yarns	..	..	47,251	43,814
	Cotton goods	..	..	25,511	23,532
				<hr/> 72,762	<hr/> 67,346

The original text in German runs as follows :—

Der Beschäftigungsgrad der Baumwollspinnereien bewegte sich im ersten Halbjahre 1937 durchwegs auf ziemlich gleicher Höhe, nahe an 90%, ermöglichte also im allgemeinen keine volle Spindelausnützung. Die Garnbestellungen, insbesondere für den Export, erfuhren im zweiten Quartale eine starke Abschwächung, sodass für die nächste Zeit eine Einschränkung des bisherigen Produktionsumfanges zu erwarten ist. Die im Dezember v.J. in Kraft getretene Kontingentierung des Inlandsabsatzes hat sich in den Garnverkaufspreisen günstig ausgewirkt.

Die Handelsstatistik ergibt für die ersten Quartale 1936 und 1937 folgendes Bild :

				1. Quartal	
				1937	1936
				q.	q.
Einfuhr :	Baumwollgarne	..	..	6,301	4,563
	Baumwollwaren	..	..	5,679	2,480
				<hr/> 11,980	<hr/> 7,043
Ausfuhr :	Baumwollgarne	..	..	47,251	43,814
	Baumwollwaren	..	..	25,511	23,532
				<hr/> 72,762	<hr/> 67,346

(*Wirtschafts-Verband CSL. Baumwollspinnereien*)

ENGLAND.

SPINNING SECTION

The position in the British cotton spinning industry shows little change, comparatively, with that of the previous quarter. Spindle activity has been well maintained in both the American and Egyptian sections, although new business is rather slow owing, presumably, to seasonal causes. Existing order books will keep the majority of firms fully engaged for several months ahead, and the Minimum Price Maintenance Agreements in operation over the major part of the spinning industry are functioning satisfactorily.

MANUFACTURING SECTION

Trading remains in a more or less spasmodic state. Orders have not been coming forward as well as they did in the previous quarter. The degree of occupation has not however, been reduced.

During the quarter wages in the weaving section have been raised by approximately 10 per cent. for weavers and 7 per cent. for other workers.

FRANCE.

The falling off in demand indicated in the last issue of the "International Cotton Bulletin" in our report relating to the state of trade in the French cotton industry during the month of March, has been considerably more marked during the second quarter of the year, and during this period the volume of business done has declined noticeably.

At the moment, a certain number of firms in the various cotton industrial districts are already working less than 40 hours per week. Nevertheless, the degree of activity of the trade as a whole has not changed much during the last quarter.

It is as yet too early to convey any idea of the repercussions which the monetary measures recently adopted by the French Government may eventually have on the French cotton industry.

During the quarter under review, increases in wages varying between 6 and 9 per cent. have been granted in the majority of the cotton districts.

The original French text runs as follows :—

Le ralentissement de la demande signalée dans le dernier Bulletin en ce qui concerne le mois de mars s'est considérablement accentué pendant toute la durée du second trimestre et au cours des trois mois de ce trimestre le volume des affaires traitées a été très faible.

Dès maintenant un certain nombre de firmes dans les différentes régions cotonnières pratiquent déjà une durée du travail inférieure à 40 heures par semaine—Néanmoins le pourcentage d'activité des manufactures n'a pas encore sensiblement varié depuis le dernier trimestre.

Il est encore trop tôt pour se rendre compte des répercussions éventuelles des récentes mesures monétaires du Gouvernement français sur la situation de l'industrie cotonnière.

Au cours du trimestre en revue des augmentations de salaires variant de 6 à 9% ont été réalisées dans la plupart des régions cotonnières.

(Syndicat Générale de l'Industrie Cotonnière Française)

IMPORTATIONS ET EXPORTATIONS.

IMPORTS AND EXPORTS

						Premier trimestre <i>First quarter</i>	
						1936	1937
						Quintaux Métriques <i>(In metric quintals)</i>	
A—Importations : (<i>Imports</i>)							
1.	Fils de coton .. .. .	..	..	..	..	1,403	3,693
	(<i>Cotton Yarn</i>)						
2.	Tissus de coton .. .. .	..	..	..	..	2,193	4,082
	(<i>Cotton Piecegoods</i>)						
B—Exportations : (<i>Exports</i>)							
1.	Fils de coton : Exportations totales			..		16,366	15,726
	(<i>Cotton Yarn—total exports</i>)						
Destinations : (<i>Countries of Destination</i>)							
	Algérie, Colonies et Pays de Protectorat			..		5,858	5,523
	(<i>Algeria, Colonies and Protectorates</i>)						
	Marchés étrangers .. .. .	..	..	..	..	10,508	10,203
	(<i>Foreign Markets</i>)						
2.	Tissus de coton : Exportations totales			..		106,694	101,535
	(<i>Cotton Piecegoods—Total Exports</i>)						
Destinations : (<i>Countries of Destination</i>)							
	Algérie, Colonies et Pays de Protectorat			..		99,170	92,912
	(<i>Algeria, Colonies and Protectorates</i>)						
	Marchés étrangers .. .. .	..	..	..	..	7,524	8,623
	(<i>Foreign markets</i>)						

GERMANY.

SPINNING SECTION

In the second quarter of this year the state of trade in the German cotton spinning section has not changed to any noticeable extent compared with the preceding quarter. The points mentioned in the previous report apply throughout for the second quarter.

The following is the original report in German :—

Die Geschäftslage der deutschen Baumwollspinnerei hat auch im 2. Vierteljahr keine bemerkenswerte Änderung gegenüber dem vorausgegangenen Vierteljahr erfahren. Die Feststellungen im vorigen Bericht treffen durchweg auch für das 2. Vierteljahr zu.

(Fachgruppe Baumwollspinnerei der Wirtschaftsgruppe Textilindustrie)

MANUFACTURING SECTION

Whereas compared with the first quarter, the orders received by the weaving section in the first half of the second quarter showed a further increase, there was a decrease during the latter half of the second quarter.

The deliveries called for on existing contracts from previous months were approximately equal in the second quarter to those of the first quarter, so that there was no appreciable restriction of production.

The original report in German runs as follows :—

Während der Neueingang an Aufträgen in der Weberei in der 1. Hälfte des zweiten Quartals gegenüber dem ersten Quartal noch eine Steigerung erfuhr, wies er in der 2. Hälfte des zweiten Quartals einen Rückgang auf.

Der Abruf auf bestehende Kontrakte aus früheren Monaten hat sich im zweiten Quartal ungefähr in den gleichen Grenzen wie im ersten Quartal bewegt, sodass keine wesentliche Einschränkung der Beschäftigung eintrat.

*(Süddeutsche Bezirksgruppe der Fachuntergruppe Rohweberei
der Fachgruppe Baumwollweberei)*

HOLLAND.

COTTON SPINNING

Conditions in the spinning section of the trade have not improved during the last few months. There is very little demand for yarns, and although most spinners are still very well engaged, the offtake of yarns is in some cases less than the production. The spinning margin has narrowed down somewhat and business altogether is very quiet.

MANUFACTURING

In the weaving section there is very little to do at present. The demand for the home market is somewhat disappointing as prices for cotton goods are rather dearer than last year and the buying power of the population does not seem to have increased in the same ratio. Most mills are still fairly well engaged, especially those catering for the export markets, although these markets are buying very little at present. Most buyers seem to prefer to wait till a part of their very heavy purchases has been sold before entering the market again, and on the whole the outlook is rather uncertain.

ITALY.

The Italian cotton mills continued active during April and reports indicated that all cotton spindles and looms were running practically at capacity throughout the month, while extra shifts were reported to be necessary in some mills. The supplies of raw materials on the whole appear to have been sufficient for current activities.

The domestic demand was active and producers for the domestic market were relieved considerably by the distribution of an additional import allotment for raw cotton which was immediately utilised. However, the bulk of the production was said to be for export and the foreign demand for Italian cotton yarns and fabrics continued to exceed current production.

(United States Department of Commerce)

JAPAN.

Activity in the cotton spinning and weaving industry continued good during April with the market tone generally optimistic notwithstanding some concern over the possible effect of exchange restrictions on raw cotton purchases and also an adverse development of foreign trade. Cotton yarn prices declined slightly during April, but textile prices were firm and recorded a small advance. Members of the Japan Cotton Spinners' Association reported April production of cotton yarn as 338,000 bales, a new record, and a gain of 10 per cent. over April output last year. Production in March, 1937, was 326,000 bales (of 400 lbs. each). Statistical data indicate an exceptional improvement in domestic consumption of yarn and cloth which has prevented accumulation of stocks despite reduced exports. For the first 4 months of 1937, yarn output amounted to 1,320,000 bales, compared with 1,174,000 in the corresponding period of 1936, according to Association statistics, which represent practically complete coverage of the Japanese cotton spinning industry.

Production of cotton broad piecegoods in all Japan during the first three months of 1937 totalled 897,620,000 metres valued at 181,368,000 yen, compared with 842,701,000 metres (138,042,000 yen) in the corresponding period of 1936. Broad piecegoods include cotton cloth wider than 19.4 inches.

(U.S. Department of Commerce)

PORTUGAL.

Production of cotton yarn and cloth during 1936 was estimated as being considerably below the 1935 output, the lesser activity being attributed to the decline in exports to the Portuguese colonies. A recent decree established a commission to regulate the cotton trade, the principal purpose being to increase imports from the Portuguese colonies.

(Textile Raw Materials)

SWITZERLAND.

In comparison with the previous quarter, the state of trade has changed only in so far as the demand has generally declined seriously during the last few months and has come to a complete standstill in the case of certain goods. Apart from mule spindles and a section of the doubling spindles, the orders previously booked made it possible to run the machinery generally at full capacity, except in isolated cases where a shortage of qualified operatives brought about stoppages.

The changes in wages mentioned in the last report were continued to the same extent.

The original report in German runs as follows :—

Die Situation hat sich im Vergleich zum Vorquartal nur insofern verändert, als die Nachfrage in den letzten Monaten allgemein stark abgeflaut und mit Bezug auf gewisse Artikel in eine völlige Geschäftsstille übergegangen ist. Von den Selfaktor- und einem Teil der Zwirnspindeln abgesehen, ermöglichten früher getätigte Orders in der Hauptsache volle Beschäftigung der Maschinen, soweit nicht vereinzelt Mangel an qualifizierten Arbeitskräften zu Stillständen zwang.

Die bereits im letzten Rapport erwähnten Lohnkorrekturen wurden im gleichen Rahmen fortgeführt.

U.S.S.R.

The output of the cotton textile industry in the U.S.S.R. during the first quarter of 1937 is reported to have been 6 to 7 per cent. below that of the last quarter of 1936 and below the quarterly plan of some 66 million yards of finished fabrics. This unsatisfactory progress in textile production is attributed to the lack of timely steps to ensure increased output. The overhauling of idle equipment, the procurement of additional parts, and the introduction of new technical devices and methods have either been extremely slow or lacking completely. According to the Soviet Press, the 1937 plan provides for a total output of finished cotton fabrics of 4,466 million yards, as compared with 3,516 million yards called for in the 1936 plan. The actual 1936 production is not yet known, but it appears that a figure of around 3,280 million yards can be assumed. Considerable difficulties will have to be overcome if the production plan for cotton fabrics for 1937 is to be carried out.

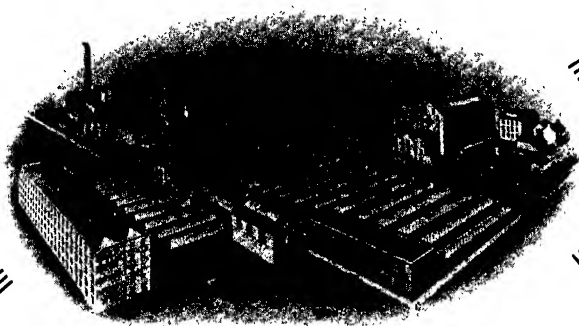
(U.S. Commerce Report)



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ARGENTINA.

The serious effects of the recent drought have been further evidenced by the third estimate of the 1936-37 cotton crop issued by the Ministry of Agriculture on the 6th instant, production being now placed at 189,000 bales, or say 41,600 tons, compared with the second estimate issued on May 5 last of 240,000 bales (52,900 tons), and with the preliminary estimate of March 5 of 350,000 bales (78,000 tons). The total crop in the 1935-36 season was 367,000 bales (80,957 tons). Between 70 and 80 per cent. of the area sown to cotton corresponds to the Chaco Territory, and, as reported in our advices of 23rd ultimo, some 50 per cent. of the crop sown there this season has been lost owing to the drought.

The Ministry also reported that total sowings in 1936-37 were 288,730 hectares with an average yield of only 520 kilos of raw cotton per hectare, giving a production of 149,720 tons, from which the estimated yield of cotton fibre is, as stated above, 41,600 tons. The average yield per hectare of 520 kilos is the lowest in the last ten years, and compares with 945 kilos in 1935-36. Nevertheless, despite the severe setback in aggregate production, the value of the whole crop is calculated at 17,700,000 pesos this year against 15,714,000 pesos last season, this being brought about by the very notable improvement in prices.

A delegation of representatives of the various entities interested in cotton in the Territory of Chaco has petitioned the President of the Republic for aid following the loss by drought of 50 per cent. of the cotton crop in the Territory. The representatives suggested various measures for alleviating the position, including loans, credits for the purchase of seed and for harvesting expenses, the intensification of forestal exploitation to provide additional employment for camp workers, reduction in rent charges, and loans for the sowing of maize, vegetables, etc., so that the settlers might not be exclusively dependent upon the cotton crop.

(Bank of London & South America)

The Argentine Ministry of Agriculture has recently issued a detailed and comprehensive report, compiled from information submitted by Government agricultural inspectors in all the districts concerned, on the condition of the cotton crop. The report on the whole is not as pessimistic as was anticipated, but it is unfortunate that the Argentine Chaco, which normally produces some 80 per cent. of the total crop, has fared worst so far as weather conditions are concerned. The prolonged drought in that area seemed likely at one time to involve a complete crop disaster,

but rains at the end of March appear to have saved the situation, and the cotton plant is notorious for its powers of recovery. In other sectors conditions have not been so bad, but insect pests have been more widespread than usual. Happily the National Cotton Board of the Ministry of Agriculture had made ample preparations for fighting pests and diseases and its efforts seem to have been successful in preventing undue damage.

BRAZIL (Sao Paulo).

As classification of the 1937 cotton crop proceeds, there becomes increasingly evident a marked deterioration in quality due to the heavy rains this year. Up to May 31 last year, the cotton classified showed 52.49 per cent. of types above the market basis, i.e. type 4 and upwards, or 86.47 per cent. including type 5. This year, however, the percentage for type 4 and over is only 25.67 per cent., and 63.34 per cent. for type 5 and above. Therefore, although the quantity of cotton of the current Paulista crop classified up to end-May showed an increase of about 5,000 tons over that dealt with at the corresponding date of last year, leading cotton export circles express the opinion that the total outturn of the crop will not be largely in excess of that produced in 1936, i.e. 176,000 tons.

Official attempts are being made to substitute the kinds of cotton grown in this State by others more resistant to pests and humidity, and it would appear that, until this is done, the quality of cotton produced during the wet season will always tend to be unsatisfactory.

Reports from the Interior state that in some districts considerable damage has been caused by pests to the 1937 cotton crop, and also there can be little doubt that the heavy rains this year proved very adverse to both the quality and quantity of the cotton in this State. Although it is still too early to make definite estimates, it would appear fairly certain that when final figures are published at the end of the crop year (February, 1938) it will be found that the outturn has been well under 200,000 tons. In fact, compared with the Ministry of Agriculture's estimate of 205,000 tons for this State, local Press reports indicate that the general impression is increasing that the crop may not exceed last year's production of 176,000 tons, and may even be substantially less.

(Bank of London & South America)

(Pernambuco).

Prospects for the 1937-38 cotton crop, commencing in August, are said to be excellent both as regards quality and quantity. The Agricultural Department of the State has issued an official crop estimate of 40,000,000 kilos provided weather conditions continue favourable. This figure compares with an estimate made in October last year of 25,000,000 kilos for the 1936-37 crop.

(Bank of London & South America)

CHOSEN (Korea).

The 1936 cotton crop is estimated at 119,000 equivalent bales of 478 pounds, a substantial reduction from the 1935 crop (189,000 bales),

although the area in 1936 was 550,000 acres against 514,000 in 1935. Upland varieties totalled 82,000 bales in 1936 and 155,000 in 1935, while the native varieties totalled 37,000 and 34,000 bales respectively.
(*Textile Raw Materials*)

COLOMBIA.

Planting during the last quarter of 1936 was reported heavy in many sections, indicating an increase in cotton production for 1937.

Cotton grown in Colombia is mostly the perennial variety. About 80 per cent. of the total cotton area is in Northern Colombia (including the Departments of Atlantico, Magdalena, and Bolivar) where about 30,000 acres are planted to cotton. Most of the crop is picked during January to April, the quantity picked during these four months in 1936 having totalled about 9,000 equivalent bales (of 478 lbs.), while the amount for January-April, 1937, was expected to be about 14,000 bales (on the basis of conditions early this year), according to local estimates.

A joint stock company, for the purchase of cotton in Colombia and also for promotion of cotton growing, was formed in 1932 by seven cotton manufacturing firms. In August, 1935, a cotton co-operative association was established with the financial aid of the Government. The association is selling the seed cotton received from its members to cotton mills, but it will sell lint cotton as well as seed cotton as soon as two ginneries, recently purchased, are in operation.
(*Textile Raw Materials*)

ITALY.

The weather of May was generally favourable for cotton. Crop condition was good at the end of the month but in Apulia and Sicily growth was irregular.
(*International Institute of Agriculture*)

IVORY COAST.

Production of unginned cotton in 1936 is estimated at 10,496 metric tons (of 2,205 lbs. each), an increase of 2,271 tons over the 1935 crop. Of the total 1936 crop, 6,061 tons were for export and 4,435 were for local consumption. The quantities for export in 1935 were 4,368 tons and in 1934, 4,032 tons. Exports of ginned cotton in 1936 totalled 2,018 tons compared with 1,481 in 1935 and 1,322 in 1934.

(*Textile Raw Materials*)

NIGERIA.

Exports of cotton lint for the first four months of 1937 amounted to 101,600 centals (21,250 bales of 478 lbs.) compared with 122,900 (25,720) during the corresponding period in 1936. Percentage: 82.6. It was reported in April that in the North all cotton markets were closed for the season. In the South the crop was stated to be a light one.

(*International Institute of Agriculture*)

PARAGUAY.

Due to the adverse weather conditions previously reported, revised estimates of the 1937 crop give a figure of not over 12,000 tons of $\frac{1}{2}$ which is much less than anticipated. Export movement has brought shipments of fibre to date having amounted to 3,930 tons.

18,500 bales. Shippers are paying from 18.50 to 20.70 Paraguayan pesos per kilo of seed cotton placed in Asuncion or Villeta.

(*Bank of London & South America*)

PERU.

Picking of cotton continues actively in all valleys, and it is estimated that at least 75 per cent. of the crop has now been sold, while forward sales have even been made of next year's crop. Reports from Piura state that conditions are very adverse owing to lack of water, and the Ica and Chincha valleys are also stated to have suffered from the same cause; production in all other valleys, however, is good.

(*Bank of London and South America*)

SALVADOR.

According to local Press reports, over 2,000 *manzanas*—principally in the Eastern districts of the country—are ready for sowing. It is further stated that agricultural authorities are assisting farmers by distributing a better class of seed at low cost, and that every effort is being made to ensure a good crop of superior quality cotton.

(*Bank of London and South America*)

SUDAN.

The Sudan Government, Department of Agriculture and Forests, Khartoum, have issued their Final Cotton Progress Report for the Season 1936-37 (in bales of approximately 400 lbs. lint) as follows:—

	Estimated Total Yield		Picked to date.		Area under Crop, Feddans	
	1936-37 June	1935-36 June	1936-37 June	1935-36 June	1936-37 June	1935-36 June
Sakellaridis Irrigated:—						
Gezira { S.P.S. Ltd. ..	186,641	152,607	186,641	152,607	167,288	164,178
{ K.C.C. ..	36,085	19,308	36,085	19,308	31,837	20,562
Tokar	29,807	8,507	29,807	8,507	43,000	14,053
Kassala	17,090	16,125	17,090	16,125	30,335	36,257
Dueim (Government Estates)	524	693	524	693	500	500
Gondal (Government Estates)	663		663	—	450	
Private Estates ..	10,028	5,649	10,028	5,649	11,029	7,570
Total Sakel. Irrigated	280,838	202,889	280,838	202,889	284,439	243,120
American Irrigated:—						
Northern Province:—						
Berber (Government Pumping Schemes) ..	2,830	1,650	2,830	1,650	2,484	2,549
Dongola (Government Pumping Schemes) ..	2,263	2,296	2,263	2,296	2,264	2,302
Zeidab (Private Estates) ..	5,321	5,154	5,321	5,154	5,269	5,561
Other Private Estates ..	990	866	990	866	1,625	1,400
Total Am. Irrigated	11,404	9,966	11,404	9,966	11,642	11,812
American Rain Grown:—						
Kordofan	24,555	22,910	24,555	22,910	125,000	95,000
Upper Nile	1,250	1,283	1,250	1,283	8,500	6,800
Equatorial	5,268	5,502	5,268	5,502	27,800	21,236
Total Am. Rain Grown	31,073	29,695	31,073	29,695	161,300	123,036
Total Sakellaridis and American ..	323,315	242,550	323,315	242,550	457,381	377,968

U.S.S.R.

Organisation and determined effort have resulted in the spring cotton planting being carried out according to plan, in spite of unfavourable weather, and considerably earlier than last year. Early efforts are being made to ensure the realisation of the 1937 plan for 829,800 tons of ginned cotton; the record cotton crop of last year reached about 704,000 tons. By May 5, 4,715,000 acres had been planted with cotton as against 4,532,000 acres on the same date in 1936. Turkmenistan, Tadzhikistan and all the new cotton growing regions finished planting five to eight days ahead of schedule.

This year tractors are being used more extensively in the work of cultivating cotton; there are 2,500,000 acres to be tended in irrigated areas alone. In all the cotton growing regions early irrigation and cultivation are being widely practised. Most of the collective farms of Uzbekistan intend to cultivate and irrigate their crops two or three times more often than is called for by the plan.

Hundreds of organised brigades of cotton workers are striving to obtain a yield of 400 kg. per acre of irrigated land this year; last year only 67 brigades succeeded in obtaining so high a yield. Two years ago only 200 kg. per acre was considered a record yield and this was obtained by only a few growers. Among the measures that will be adopted to ensure a high yield are the thinning of plants and transplanting from crowded to sparse areas; more frequent and efficient cultivation, the greater use of fertilisers and better irrigation.

Last year's high crops brought the cotton growing collective farmers considerable increases in income. Their bonuses alone totalled 1,303 million roubles and on the whole their receipts were 50 to 100 per cent. higher than in 1935. The bonus system is to remain in operation this year.

(Monthly Review of the U.S.S.R. Trade Delegation in Great Britain)

By the middle of May cotton sowings were finished and 99.9 per cent. of the plan has been accomplished. In some places the sowings were 10 to 15 days late. Owing to the damage suffered by cotton as a result of the unfavourable weather of April, when there was excessive rain, snow and frost, hoeing and irrigation were of great importance if good results were to be obtained. On May 20 work had been done on 1,641,000 acres compared with 2,842,000 acres fixed by the plan for the irrigated cotton regions. During the last two decades of May and the first of June dry warm weather predominated in the Central Asiatic Republics.

(International Institute of Agriculture)

COTTON GROWING IN THE BRITISH EMPIRE

The British Cotton Growing Association, in its thirty-second annual report, states that once again British Empire Cotton production exceeded all previous records. The approximate estimate of the grown and produced in Empire fields has reached just over three

of a million bales, though in most of the territories concerned the climatic conditions were far from good and poor crops were harvested. An exception was Uganda, which again heads the list of producers. The crop was easily a record one for the country and more than made up for the shortage elsewhere. The report, after pointing out the rise in the price of most commodities, states that in contrast with the position of nearly every other commodity, cotton has shown little tendency to follow any extreme course, the restraining influence being the ever-present possibility of the release of the controlled cotton held by the Government of the United States of America and the increased supplies of outside growths, British Empire and other, which appear adequate to meet demands.

COTTON GROWING IN ETHIOPIA

The following is extracted from an article recently published in the *Textile Recorder*, describing the work done by the Italian authorities in connection with the production of raw cotton in Ethiopia :—

Cotton is grown around the Tsana Lake, in the Tchercher, Tigré, in the island of the Zuai Lake, and in the Kambata, and its habitat is found in the irrigable alluvial soils between 1,000 and 1,500 metres on the level of the sea. These conditions are found also in the zone around the Margarita Lake where it is grown by the Galla people who are using the fibre for the output of good textiles.

According to the investigations carried out by experts, it appears that the most suitable zone to carry out the extension of the growing of cotton in Ethiopia, is the Margarita Lake Territory, because it is possible to find in that district cheap labour, the Gurachi and Sidamo people being good farmers, and because good water supplies for irrigation are available.

Investigations have revealed that all over Ethiopia primitive methods are used for the harvesting, carriage, sale, spinning and weaving of cotton and before going into the question of extending cotton plantations, it will be necessary to go into the problem of grading depots and warehouses to facilitate the sampling and packing of the cotton. From a preliminary estimate it would appear that 200,000 centals of raw cotton could be obtained from the present plantations, and that, if extended, a cotton crop varying from 800 to 900,000 centals yearly could be expected, which is equivalent practically to the total quantity of raw cotton required at present by the Italian industries.

In the course of its last meeting the Italian Cabinet has approved a set of measures to favour the cultivation of cotton in Italian colonies, and it should be noted that the first shipments of Ethiopian cotton have already arrived at Genoa and Venice, where a delegation of representatives of the French cotton industry have been sent to inspect the fibre and to investigate the possibility of co-operating with Italy in exporting cotton from Ethiopia to France as soon as this would become practicable.

In the meantime Comm. 'de Bassan, the head of the Italian cotton

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mission in Ethiopia, has granted an interview to the Press, in which he pointed out that the work of the mission in Ethiopia has been directed upon three aims : (1) to create a standardised cotton output introducing new growths, as the existing cotton is of an inferior type ; (2) to establish a growing organisation with which it may be possible gradually to reach an unlimited quantity output, and (3) to undertake the production of cotton in Ethiopia at a cost which can be supported by the Italian industry. Comm. de Bassan stated that to expect to produce cotton at a lower price than in U.S., India or Egypt would be futile, but he is of the opinion that it may be possible in the course of time for Ethiopia to undertake the export of cotton, especially taking into account the possibility of producing cotton having the characteristics of American cotton. As a matter of fact Comm. de Bassan has confirmed that the medium long fibre cotton of American type will be cultivated in Ethiopia. According to the statements of the mission the works of cultivation are to be started immediately on behalf of the company on the same lines as *Comité Congolais*, and of the *British Empire Cotton Growing Corporation*.

PROMOTION OF COTTON PRODUCTION IN SOUTH EASTERN EUROPE

Governmental encouragement of cotton expansion in South-Eastern Europe has been an interesting feature of the agrarian policies of several countries in that area during the past four or five years. Although cotton has been produced in South-Eastern Europe for many years, it was not until quite recently that any special consideration was devoted to the crop. Increased attention to the cultivation of cotton was brought about by the shortage of foreign exchange and a consequent effort to reduce dependence on imported cotton.

Among the measures adopted to accomplish this objective are the fixation of prices for the domestic cotton crop at levels higher than those prevailing for foreign growths in the world market, compulsory utilization of domestic cotton by the local textile mills, and taxation of imported cotton to create a fund with which to equalise prices and finance the various activities designed to increase cotton production.

As a result of these measures, the area and production of cotton in the four countries for which information is available has expanded very materially in recent years, as is shown in the following table :—

Country	Average 1928-29 to 1932-33		1936-37	
	Area 1,000 acres	Production 1,000 bales *	Area 1,000 acres	Production 1,000 bales *
Greece ..	46.7	16.4	138.0	58.0
Bulgaria ..	14.8	4.3	72.0	29.0
Yugoslavia ..	2.2	.5	5.0	1.0†
Rumania ..	.2	.1	4.0	1.0
Total ..	63.9	21.3	219.0	89.0

Compiled from official U.S. Govt. sources and the International Institute of Agriculture.

* Of 478 pounds, net. † Estimate for 1935-36.

There has also been a material expansion in the production of cotton in Turkey but the actual extent of this expansion is not definitely known. (*Extracted from "Foreign Agriculture," issued by the United States Dept. of Agriculture.*)

THE SEA ISLAND COTTON INDUSTRY.

A recent article published in the West Indian Committee Circular, gives a resumé of the work undertaken by the West Indian Sea Island Cotton Association, from which the following is extracted :—

One of the first acts of the newly formed West Indian Sea Island Cotton Association was to make application for the registration of a Certification Trade Mark for goods made wholly or principally of British West Indian Sea Island cotton. There were various difficulties to be surmounted, but in 1935 a trade mark was duly registered, the use of which has proved of great benefit to the industry. Some 70 firms have now applied for permission to use the certification mark, which is now restricted to goods manufactured entirely within the British Empire.

As a result of these developments and the activities of the Advisory Committee in fostering wider uses, the consumption of Sea Island cotton has increased.

In the West Indies it has been possible through the Association to take effective steps, previously practically impossible, to regulate production in accordance with demand. The benefit which has resulted from a reasonable restriction of production whilst promoting increased demand was clearly shown at the annual meeting of the Association in January, 1936, when the President said, "A few years ago, influential people in the cotton industry in Great Britain expressed the view that the trade cared little whether it again saw a bale of Sea Island cotton or not. There was a stock on hand in 1932 (the year before the Association was formed) of roughly 7,000 bales, and a very restricted demand. By the end of 1935, this surplus had completely disappeared and the production of 1935 had been nearly absorbed. The sales in 1935 were 3,500 bales of that year's crop and 1,700 carried over, from 1934, i.e., a total of 5,200."

Not only had consumption increased but a better price had been obtained, so that at the last annual meeting held in November, 1936, it was pointed out that whereas "three years ago the value of Sea Island cotton exported from the West Indies was approximately £30,000, this year it will probably reach £100,000." Further measures for the improvement of the industry are being actively prosecuted through the Association in the West Indies and through the Advisory Committee in England.

COTTON GROWING IN MANCHURIA.

The following article has been extracted from *Foreign Agriculture*, published by the United States Department of Agriculture, and was

originally produced in a report issued by the South Manchuria Railway, Dairen :—

“Among the industrial crops cotton deserves special consideration, not so much because of the quantity actually produced—which is small—but chiefly because of the efforts that have been made in recent years to expand cotton production in Manchuria. In 1933 the Manchurian cotton output from an area of 135,000 acres was 60,000 bales of 500 lbs. The annual cotton requirements for consumption in Manchuria amount to about 4 lbs. of raw cotton per capita, compared with 25 lbs. in the United States, or a total of 270,000 bales of 500 lbs. Taking into consideration the present rate of population growth, it is estimated that by 1950 the cotton requirements of the country will rise to about 350,000 bales. A slight increase in per capita consumption would raise the requirements to 400,000 bales. At present the native output of cotton constitutes only 25 per cent. of the requirements. Of the remainder, half is imported in the form of cotton piecegoods and the other half in the form of raw cotton.

In 1933 the Manchurian authorities, in conjunction with Japanese interests, launched upon a policy of increasing the cultivation of native cotton varieties, as well as of the early maturing American types, and of improving the quality of native cotton for spinning of medium-count yarn. More concretely, the programme called for annual expansion of the cotton area until it reached 740,000 acres by 1950, a very marked expansion over the 135,000 acres under cotton in 1933. The programme anticipated that such an area would produce a crop of around 400,000 bales, of which 50 per cent. or more was to consist of upland varieties from original American seed.

Such was the main scope of the programme despite the recognition in industrial and certain other circles of Manchuria that any large-scale increase in cotton acreage faced serious obstacles. Among the more important are climatic and soil conditions, which restrict cotton growing to a limited area in South Manchuria, where cotton has been grown for centuries. It was nevertheless felt that more cotton could be produced in South Manchuria if farmers were to substitute cotton for other crops. This seemed plausible in the years 1933 and 1934, when the low prices of soybeans were partly responsible for the decrease in acreage under this most important cash crop in South Manchuria. But even if farmers are willing to shift to cotton when prices of soybeans are low, the production of a type of cotton comparable with American would be extremely difficult because of the comparatively short growing season.

Two organisations have been set up to stimulate cotton production in Manchuria. The first, organised in 1933, is the Manchuria Cotton Association, controlled by the Manchurian Government and the South Manchurian Railway, the latter being controlled by the Japanese Government. The business of the Association was to organise branches in leading cotton-growing districts and to station experts there for the purpose of teaching and encouraging the best methods of cotton cultivation ; to operate seed farms and experiment stations ; to render assist-

ance in the co-operative marketing of cotton and to give financial assistance to the growers.

The second organisation was the Manchurian Cotton Company, organised in 1934, with a capital of 2,000,000 Yen (\$594,000), and controlled by the Manchurian Ministry of Industry. The main functions of the company were to guarantee minimum prices for all cotton delivered to it and to provide seed to the farmers who wished to grow cotton. The company was also authorised to pay higher prices for cotton grown in certain sections in order to stimulate production there. One-half of the company's capital was subscribed by the Government and the other half by Japanese interests. In order to assist the company in the early stages of its existence, the Government decided to turn back any dividends accruing to the account of its shares until such time as it was able to declare a 6 per cent. dividend.

Judging by the results achieved to date, it is highly problematical whether Manchuria will be able to expand cotton production along the lines indicated in the programme. It is true that the Manchurian farmers increased their cotton area from 135,000 acres in 1933 to 227,000 in 1934. The yield per acre in 1934, however, was 25 per cent. below that of the preceding year, with the result that the outturn increased only by 16,000 bales. Despite efforts of the authorities to induce the farmers to maintain or even extend the acreage, the cotton area was reduced to 140,000 acres in 1935 and the output to 63,000 bales. The reduction in acreage was due to the poor yields obtained the preceding year and to the fact that with the rise in agricultural prices, farmers were attracted to the cultivation of other crops.

The experience gained in cotton growing since the inauguration of the programme revealed the tremendous difficulties inherent in any attempt to make Manchuria self-sufficient in cotton. The Manchurian authorities still profess an interest in increasing cotton production, but it is officially reported that "the 20-year plan which was drawn up in 1933 was temporarily discontinued in 1936 and a 3-year investigation of fundamental conditions was instituted."

NEW LONG-FIBRE COTTON IN SOVIET RUSSIA.

The Central Selection Station of the All-Union Cotton Research Institute has evolved a new long-fibre, early ripening variety of cotton with large bolls. This is claimed to be the first time that early ripening cotton combines a large boll with fibre over 30 millimetres long. Several varieties have been produced and these will be used to replace the small boll varieties still being grown on hundreds of thousands of acres in the U.S.S.R. When this important advance has been made it is stated that the Soviet cotton fields will be entirely cleared of short-fibre cotton. Incidentally, the area under cotton in the U.S.S.R. has now reached the figure of about 5,000,000 acres. Cotton cultivation has spread far

beyond the borders of Central Asia and Transcaucasia; the aggregate area sown with cotton in the Ukraine, Northern Caucasus, Azov-Black Sea Area, and the Crimea now exceeds 1,000,000 acres.

(*The Indian Textile Journal*)

WORLD'S COTTON CROPS

The following particulars are extracted from the Empire Cotton Growing Review for July, 1937 (in bales of 500 lbs.—000's omitted).

					1933-34	1934-35	1935-36	1936-37
U.S.A. Lint	..	..	..	..	13,047	9,637	10,638	12,399
Linters	..	..	..	..	982	1,601	1,089	1,300
Total..	..	..	..	..	14,029	10,638	11,717	13,699
Mexico	..	..	..	..	255	223	251	373
Brazil	..	..	..	..	1,014	1,359	1,765	1,800
Peru	..	..	..	..	278	342	374	372
Argentina..	..	..	..	..	191	295	367	240
Other South American	..	..	..	..	74	69	94	143
India*	..	..	..	..	5,108	4,857	5,933	6,307
China	..	..	..	..	2,652	3,033	2,410	760
Japan, Korea, etc.	..	..	..	..	197	223	230	232
East Indies, etc.	..	..	..	..	15	15	14	16
Russia	..	..	..	..	1,844	1,772	2,347	3,300
Persia	..	..	..	..	137	200	120	161
Iraq, Ceylon, etc.	..	..	..	..	†	2	4	8
Asia Minor and Europe..	..	..	..	..	202	263	377	431
Egypt	..	..	..	..	1,715	1,511	1,707	1,821
Sudan	..	..	..	..	126	237	199	259
East Africa (British)	..	..	..	..	274	273	331	338
South Africa (British)	..	..	..	..	3	3	2	3
West Africa (British)	..	..	..	..	23	47	48	40
Non-British Africa	..	..	..	..	154	165	223	224
West Indies (British)	..	..	..	..	3	4	4	5
West Indies (Others)	..	..	..	..	24	31	26	27
Australia, etc.	..	..	..	..	18	14	14	15
World's Total	..	..	..	..	28,337	25,576	28,567	33,574
Outside Growths	..	..	..	..	14,308	14,938	16,840	19,875
Per cent. on Total	..	..	..	..	50.5	58.4	58.9	59.2

* Government estimate, 400 lb. bales.

† Less than 500 bales.

WORLD ACREAGE AND PRODUCTION

The following table gives the Acreage and Production, in specified countries, average for the 10 years ended 1932-33 and 1936-37.

Compiled from official sources, International Institute of Agriculture and estimates of the United States Bureau of Agricultural Economics.

Country	Acreage		Production
	10-year average 1923-24 to 1932-33 1,000 acres	1936-37 * 1,000 acres	10-year average 1923-24 to 1932-33 1,000 bales 478 lbs.
United States	40,509	30,028	14,414
India	25,141	25,219	4,466
China	4,759	8,547	2,098
Russia	2,641	5,023	1,106
Egypt	1,782	1,781	1,486
Brazil	1,629	—	530
Peru	304	—	240
Mexico	390	786	212
Argentina	261	713	116
Uganda	675	1,488	151
Anglo-Egyptian Sudan ..	268	475	114
Chosen	462	560	131
Turkey	†392	627	80
Bulgaria	11	72	3
Greece	41	138	15
Syria and Lebanon ..	†56	99	10

* Preliminary.

† Average of 9 seasons, 1924-25 through 1932-33.

EAST AFRICAN COTTONS

The Cotton Buyers' Association, Bombay, is recommending the standardisation of the staple length of East African cotton. This is the result of the increasing demand for this type of cotton by Indian mills. Immediate adoption of the United States $1\frac{1}{16}$ in. Universal Standards as the basis of staple length is being urged.

The East India Cotton Association, to whom the recommendation has been made, has also been asked to introduce for an experimental period of two years American Universal Standards and then to attempt further progress, preparing staple length standards in the light of experience gained and having regard to the quality of the growths actually coming into the market.

Staple standard for East African cotton, at present being prescribed by the East India Cotton Association, is $1\frac{1}{16}$ in. "as ordinarily judged by the trade," which is equivalent to 1.03 in. by laboratory test. It is argued, however, that a standard based on the judgment of the trade is indefinite and variable according as to whether the buyers or sellers have the predominant voice in judging the staple.

(*Textile Mercury, Manchester*)

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U.S. GOVERNMENT ACREAGE REPORT

The report issued on July 8 by the Washington Department of Agriculture on the cotton acreage under cultivation on July 1 indicates an increase of 10.4 per cent. on the area planted last year. The total acreage is returned at 34,192,000 acres, comparing with 30,960,000 acres planted last year, 27,888,000 acres in 1935, and 27,860,000 acres in 1934. Lower California is estimated to have 140,000 acres under cotton against 140,000 acres last year, but this was not included in the United States total.

The following are the acreage details (in thousands):—

	1937	1936	1935	1934
Virginia	65	54	53	58
North Carolina	1,080	973	939	980
South Carolina	1,643	1,416	1,369	1,299
Georgia	2,644	2,299	2,172	2,164
Florida	115	90	91	93
Missouri	497	414	308	319
Tennessee	946	837	743	763
Alabama	2,568	2,335	2,252	2,144
Mississippi	3,371	3,010	2,665	2,556
Louisiana	1,550	1,409	1,231	1,201
Texas	12,926	12,080	10,964	10,685
Oklahoma	2,635	2,558	2,427	2,909
Arkansas	3,096	2,764	2,178	2,196
New Mexico	138	118	94	100
Arizona	270	208	160	136
California	618	370	220	225
Other States	30	25	22	32
Total	34,192	30,960	27,888	27,860

The following are the comments cabled relating to the crop on July 1:—

The acreage of cotton in cultivation in United States on July 1 is estimated by the Crop Reporting Board to be 34,192,000 acres, which

is 10.4 per cent. more than the acreage on July 1, 1936, but 17.5 per cent. less than the average acreage for the five-year period 1928-32. This acreage compares with 28,197,000 acres in 1935, 27,860,000 in 1934, 40,248,000 in 1933, and the 1928-1932 average of 41,424,000.

Increases are shown in all States with the least expansion in Oklahoma and Texas, where increases of 3 and 7 per cent. respectively are indicated. Increases in South Atlantic and South Central States range from 10 per cent. in Louisiana and Alabama to 16 per cent. in South Carolina and 28 per cent. in Florida.

Georgia shows an increase of 15 per cent., Mississippi and Arkansas of 12 per cent., and North Carolina of 11 per cent. The increase in California is indicated at 67 per cent. which, following the increase of 68 per cent. in 1936, places the current year's acreage for the State at the high record of 618,000 acres.

A total of 20,000 acres of Sea Island Cotton is reported in Florida and Georgia. This compares with less than 5,000 acres last year, which was the first year that any material acreage has been planted to Sea Island Cotton since 1922. The type is more susceptible to boll weevil damage than varieties with short staple, and with advent of weevils its cultivation was practically abandoned. Last year, however, weevil damage was relatively light in Florida and South Georgia, which fact encouraged planting of this type again.

In Arizona the acreage of American Egyptian Cotton is indicated

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at 25,000 acres compared with 38,000 in 1936. This includes acreage of new variety cotton. The new extension of the cotton area is shown in Nevada where 1,000 acres are reported officially this year for the first time.

No report on probable production of lint will be made by the Board until August 9.

REVISED ESTIMATES OF THE COTTON CROP, BY STATES

The Crop Reporting Board of the Bureau of Agricultural Economics, from the reports and data furnished by crop correspondents, field statisticians, co-operating State agencies, and Census-reported ginnings, makes the following revised estimates of the cotton crop of 1935 and 1936.

State	Area in cultivation July 1		Area picked		Yield of lint cotton picked per acre		Production* (500-lb. gross weight bales)		Ginnings, 1936 crop, as reported by census May 19, 1937
	1935	1936	1935	1936	1935	1936	1935	1936	
	1,000 <i>acres</i>	1,000 <i>acres</i>	1,000 <i>acres</i>	1,000 <i>acres</i>	<i>Lb.</i>	<i>Lb.</i>	1,000 <i>bales</i>	1,000 <i>bales</i>	<i>Bales (500 lb. gross)</i>
Virginia ..	53	54	52	53	273	298	30	33	30,296
North Carolina ..	939	973	930	957	294	298	572	597	599,746
South Carolina ..	1,369	1,416	1,362	1,399	261	270	744	816	815,788
Georgia ..	2,172	2,299	2,155	2,276	235	228	1,059	1,086	1,090,085
Florida ..	91	90	89	88	165	170	31	31	26,789
Missouri ..	325	414	319	410	265	360	177	308	303,252
Tennessee ..	757	837	750	829	202	250	317	433	432,757
Alabama ..	2,252	2,335	2,243	2,321	226	236	1,050	1,145	1,148,524
Mississippi ..	2,762	3,010	2,740	2,998	220	305	1,259	1,911	1,910,661
Louisiana ..	1,278	1,409	1,268	1,401	210	260	556	761	761,149
Texas ..	10,964	12,080	10,657	11,597	133	122	2,956	2,933	2,938,479
Oklahoma ..	2,427	2,558	2,318	2,251	117	62	567	290	286,379
Arkansas ..	2,312	2,764	2,268	2,731	180	227	853	1,205	1,302,992
New Mexico ..	94	118	90	116	308	457	75	111	107,880
Arizona ..	160	208	160	†208	405	†438	135	†191	189,963
California ..	220	370	218	368	524	574	230	442	442,444
All other ..	22	25	21	25	193	313	9	16	12,198
United States Total..	28,197	30,960	27,640	30,028	184.2	197.9	10,638	12,399	12,398,882
Lower California (old Mexico)†	115	140	113	139	304	210	72	61	¶61,053

* Bales rounded to thousands, allowances made for interstate movement of seed cotton for ginning and added for United States total.

† Includes Pima long staple, 38,000 acres, yield 230 pounds per acre, production 18,000 bales.

‡ Not included in California figures, nor in United States total.

¶ Ginnings 61,033 running bales, as enumerated by California Crop Reporting Service.

The Crop Reporting Board, in revising statistics of acreage, yield per acre, and production of the 1936 cotton crop, estimates the area in cultivation in the United States on July 1 to have been 30,960,000 acres; the area harvested 30,028,000 acres; and the yield of lint cotton to have been 197.9 pounds per acre. The report of the Bureau of the Census, published on May 19, placed final ginnings for the 1936 crop at 12,398,882 equivalent 500-pound bales.

The revised estimates of planted and harvested acreage for the United States in 1936 vary less than one-tenth of 1 per cent. from the

sides, and in the event of a difference in the quality of the cotton from the two sides, the bales are given the classification of the low side. This is not always the practice in other countries.

Dr. Black pointed out that under existing methods of bale identification it is practically impossible to trace false-packed bales to their source because, as the bales move through marketing channels, identification tags and marks customarily are lost or removed, or they are replaced by others upon each change of ownership.

Bureau technologists have been seeking some way of preserving the identity of cotton bales, from producer, through the channels of trade to the cotton mills. They believe their newly devised tag might solve this problem.

The tag is fire and weather resistant and is installed in a bale of cotton during packing at the gin, so that it cannot be removed until the bale is opened. The tag gives the state and gin where the bale was packed, the year of growth and the ginner's serial number of the bale. The tag is visible on the head of the bale and is attached to an eyelet on the end of a steel anchor wire, 28 inches in length, embedded lengthwise in the bale.

Dr. Black announced that the use of this identification tag has been authorised for experimental use by a limited number of gins this season, and that consideration is being given to the question of making further investigations of cotton at American mills to determine whether conditions discovered by Taylor in European countries are prevalent on this side also."

THE WORK OF THE DELTA EXPERIMENTAL STATION, STONEVILLE, MISS.

The following is extracted from an article by Mildred G. Barnwell, which appeared in a recent issue of the American journal *Cotton* :—

Although the Delta Experimental Station was opened in 1904, it was not until 1911 that cotton variety work began at the station in earnest and since that year records have been available. Under E. C. Ewing, plant breeder of State College, some Express and Foster cotton seed from Texas were experimentally used, and from these two hybrid cottons have come the Delfos and Missdel strains of cotton seed, progeny worth millions to the entire alluvial area. In 1918 and 1919 cotton yields and prices were both good and Delta Station cotton and other products made a clear profit of \$16,000 which was turned into the state treasury. With this record enthusiasm mounted, the support fund was increased 56 per cent. the following year and improvements went forward rapidly : the experimental area was doubled and W. E. Ayres employed as plant breeder. Under his direction in 1922 eight co-operative cotton variety tests were planted, four of them producing valuable results in the fall, marking the first co-operative work undertaken by the station. At this time Mr. Ayres was made director in charge of all work and cotton experimentation became a real business.

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Co-operative fertilizer tests indicated the cotton planter should spend his fertiliser money on nitrogen ; co-operative cotton-variety tests became popular and cotton breeding work was increased to about 600 strains. The Delta Pedigreed Seed Association was organised to increase to best advantage plantings of Delta Station seed which surveys had shown were being lost to the extent of approximately 85 per cent. under the old method of distributing seed "first come first served." Through the Association, Delfos seed was distributed on contract on a pro rata basis to the different counties, the distribution being based on taxable values rather than the old formula. At the end of five years of seed work it was found that Delta Station bred seeds produced an average of 33.4 per cent. more than the three other most used varieties. This amounted at 1924 prices to more than 18 millions of dollars on the Delta crop.

The year 1925 marked the birth of the famous Missdel No. 4, a milestone in staple cotton development, and thereafter year by year the appropriations for plant development were increased and the work expanded in direct ratio.

Crop preparation was practically completed and some planting done when the Mississippi River levee broke and the station flooded in April, 1927. Six weeks later, the water having receded, the first cotton of that season was "muddied in" (May 29), and the yield that year spectacularly averaged 652 lbs. of lint per acre. In the meantime, however, six bushels of Missdel No. 1 seed were sent out of the flooded area, via motor boat, and planted under contract and a cotton variety test was planted at Shaw, Mississippi, on May 1 to make sure that the continuity of variety tests records should not be broken. After the high water went down cotton breeding work was expanded to include 800 first year selections and more than 200 old selections.

In 1928 with the Legislature appropriating \$78,000 for the support and improvement of the station the experimental area was increased and that year 289 bales of cotton were produced on 260 acres.

At cotton-growing season's close in 1931 the Delta day crowd at Stoneville had exceeded 5,000 people, but the station found itself short of workers and funds. Cotton was down to five cents a pound. At one time the closing of the Delta Station seemed imminent but eventually enough Federal funds were allotted to the station to continue the permanent work. This stringent campaign on the part of the station's heads so appealed to the Delta that the planter made sure that the future station work should be guaranteed with a special legislative cotton experimental appropriation of \$15,000 a year.

Never was station work needed more for 1931 also marked the disastrous Delta crop when mills found the cotton of such poor breaking strength that they turned to the Carolinas and other substitute states for their raw material.

In 1932 experiments were begun to determine the effect of water, fertilisers, legumes, cultivation, spacing, soil preparation, etc., on the

length, fineness, breaking strength and general spinning quality of cotton.

Since 1925 the Delta had realised that gin damage to the cotton was a major economic factor. The U.S. Department of Agriculture was finally determined on the idea of necessity of fundamental research to determine causes of and remedy for this damage, and in 1930 President Hoover signed the Bill appropriating \$100,000 for an experimental ginning and fibre laboratory set-up, location being given to Stoneville. This fund was supplemented by \$37,500 by the state legislature.

The Federal Gin and Fibre Laboratories make, each year, 4,000 to 5,000 tests to determine the effect on grade, staple, preparation and final spinning value on typical cottons from throughout the South, handled differently both in the field and at the gin. The fibre laboratory has each sample graded and stapled by an expert classer ; samples from each separate gin treatment are sorted on Suter-Webb sorters to classify their lint according to its length from longest fibre to linters (if any) contained. The length-groups are then weighed and the percentage of each is computed in hope that ultimately the yarn strength may be correlated with these data, for the ultimate aim of all these tests is mill utility and the early determination of such in the ginned sample.

Production ratio alone whereby former favourites are discarded for better producing types is a big job in research work ; time of maturity whereby early maturing cottons have outwitted the boll-weevil is an outstanding development ; but the general motive and the object of special study by all is quality. On this latter item five to seven ginning and fibre tests are made annually.

Since 1904 the buildings of the station have increased from 3 small cabins to 20 fine residences, a two-storey dormitory to house 15 scientists, dwellings for 32 labourers and their families, a barn and granary having more than 25,000 square feet of floor space, two three-storey 50-room fireproof office buildings, two large fireproof laboratories and storage buildings with 75,000 to 100,000 square feet of ginning and flooring space for cotton.

Today the Delta Experimental Station at Stoneville, Mississippi, is the largest in America with 3,900 acres for experimental use, of which 800 cultivatable acres are laid out in 30,000 plots. Each plot is a crop experiment. Each plot is a problem to be solved.

When the mechanical cotton picker was being discussed, Mr. Ayres invited the Rust brothers to bring their machine to Stoneville. If the mechanical picker is adjusted to commercial use it will be due to further perfections in the cleaning process, either at the gin or at the picker machine, shown to be necessary by experiments made through the Federal ginning and fibre laboratories at Stoneville, as well as through spinning tests made at Clemson College, S.C., and College Station, Texas.

The workers at Stoneville have one major aim : to make their station the world centre for authentic cotton information and research. To the culmination of this aim all bend their efforts.

THE U.S. TARIFF POLICY AND ITS RELATIONSHIP TO THE COTTON SITUATION

THE following is extracted from an address delivered recently by Mr. Lamar Fleming, Jr., of the firm of Anderson, Clayton & Co., before the East Texas Chamber of Commerce on the future of cotton.

"The causes for American cotton production to lag so far behind the general trend and for foreign cotton production to jump so far ahead of it are not, I believe, difficult to indentify. The outstanding cause is known to us all. It is international exchange, which has been made an obstacle to our cotton exports by our tariff policy, our credit policy, and our creditor position, and has been made into an assistance to cotton exports of other countries, by these policies of ours and by their own debtor positions. Other causes have been the recent tendencies of most nations toward policies of economic nationalism and the movements of population, both of which tie in with the policies of this country, and the relation between cotton prices and the prices of other agricultural products, and incidentally the trends in the qualities of our cotton and of foreign cottons.

But I believe the greatest single influence back of the increase in foreign cotton production has been our tariff policy. It made it impossible for Germany, for instance, to pay us for her cotton requirements, by preventing her from shipping us an equivalent value in her goods as payment. On the other hand, Brazil needs locomotives, other railway material, industrial machinery, and the like, which Germany can produce. This creates a cut-and-dried situation, the logical solution of which is for Germany to buy her cotton in Brazil and sell Brazil her locomotives and other things. This example applies to every country to which we sell cotton, although not generally in such marked degree as in the case of Germany.

I believe it is reasonable to expect that there will be a continuing increase in the world's consumption of cotton, sufficient to take care of a reasonable increase in the production; for per capita buying power, particularly in the raw-material countries, seems to be a definite upward trend and the appetite for the material things of modern civilisation is spreading with great rapidity among the primitive peoples of the world.

However, I believe it is idle for us to expect that world consumption will increase as fast as foreign production so long as our tariff policy continues to exert the stimulus which it now exerts upon foreign production, the more so if by artificial crop restriction we shield the foreign producer from the effects of our own competition. In other words, I think it is plain that we cannot profitably maintain our present rate of cotton production in the United States unless we reverse our tariff policy and let the outside world create the dollar exchange for our cotton by sending us its products.

If this conclusion is correct and if our tariff policy continues unchanged, then we have before us the gradual retirement of the United States from the cotton export field and the eventual limitation of our production to the quantity required by the United States mills.

An adjustment of this kind, of course, will bring great suffering. There are so many millions of people in the South dependent for their livelihoods upon growing cotton, transporting it, ginning it, handling it, and stevedoring it that the elimination of the export crop and the impoverishment of these people could not fail to bring suffering to every business and almost every person in the South. The case in Texas would be the worst of all; because our freight rates place us at a great disadvantage in furnishing cotton to the American mills, hence our crop is almost entirely an export crop, and so the elimination of export crops would fall heaviest upon us.

I do not assume, however, that the South nor Texas could not adapt themselves to such a situation in some manner. The land would still be there and the climate; and the need for a livelihood would force us to find other things that they are fitted to produce. Among those are, we know, wheat, corn, meat, and dairy products. We would be forced to produce more of those things, which now are the basis of livelihood in the Middle West. Then it would remain to be seen how the Middle Westerner could survive in the face of an export surplus of his own products; and we would have again in those products the dilemma which faces us now in cotton.

Of course, the unfolding of such a sequel to our tariff story would bring home to the Middle West the awful significance of the mistake they have made for the last seventy years in furnishing the votes to perpetuate our unholy tariff system; and that realisation in the Middle West would be the end of the system. What I pray for, and I believe that every thinking one of us must pray for it, is that this realisation will come before the story has to run its full terrible course. If it comes in time, we can still escape the most tragic chapters of the story, by a gradual downward revision of the tariff.

From time to time, in despair of any honest downward adjustment of the tariff, friends of the cotton farmer have advocated measures to compensate him for its effect. One was the Export Debenture, meaning a bonus of so much per pound on cotton exported. Another was the so-called Domestic Allotment, meaning a payment of so much per pound to the farmers on the cotton spun within the United States. The Export Debenture would have the effect of causing the price of cotton within the United States to be higher by the amount of the bonus than the price of it outside the United States, and thus would afford the farmer a kind of inverted tariff protection. The Domestic Allotment would leave the price in the United States the same as the world price, but would require the American spinner, on the part that he used, to pay a bonus to the farmers. I will not stop to explain the complicated details. Both of these plans are objected to because quite clearly they are, in effect, export bounties, in violation of the spirit at least of international

agreements with respect to dumping. Certainly they would cause complications with foreign countries and retaliation.

I have followed these proposals with sympathy, agreeing of course with the sentiment that animated them, but always with a distaste for the indirection which characterised them both and also for the element of bounty involved. I don't like bounties or bonuses, because the very words have an odour of bribery and imply that the farmer is being bought off from his insistence upon some just and inalienable right. In fact, is that not their significance? If either of these bounty plans were adopted, would it not be in the very nature of a trade between protected minorities and the farmer, or the South if you will, where he consents to the perpetuation of something wrong in favour of these protected minorities in return for cash consideration?

Although it never can be pleasant to contemplate, there may be times when the practical thing to do is to trade out on one's rights. Your lawyer, for instance, will advise you to compromise, particularly when he fears that your case is likely to be lost if you pursue it. We have been through several generations now when our case against the tariff appeared hopeless. Today, when facts are giving inescapable proof of the soundness of our arguments, it seems to me it would be unwise for the Southern farmer to sell out his cause, which also is the cause of the Middle Western farmer. I think he should refuse any compromise and should go with his arguments to the Middle West, confident that a little patience and further suffering will be rewarded by the breaking up of the misguided alliance by which the Middle Western voters, at great sacrifice to their own interests and rights, have kept the protected minorities in charge of our tariff policy.

In this, the Southern farmer, and those Western farmers who already see the light, will take great heart from the fact that there are at least some sympathetic souls in high position in Washington. The Secretary of State (Mr. Hull) has fought this battle since boyhood and still is fighting it. The Secretary of Agriculture knows the significance of our tariff situation, as his writings clearly reveal. These men and others stand ready to champion the farmers' cause, when the farmers themselves join in a clear understanding of it and, refusing to be diverted by any more proposals that do not strike at the fundamental issue, concentrate militantly on the one issue at stake—the reconquest of their inalienable right to trade their products on a basis of equality for the products of the rest of mankind."

CROP CONDITION

Advices received by the New York Cotton Exchange Service from approximately 400 crop correspondents, under average date of June 28, emphasise the highly favourable crop situation as of that date. The condition of the crop was reported as far above the average for that time, and one of the highest on record. The crop condition apparently rose

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slightly during the last half of June, from the high level at the middle of the month. The improvement was evidently due to the hot, dry weather during that period, which permitted the cleaning of fields which had become grassy, stimulated the rapid growth of the plant and effected some control of insects. As of the end of June, it was reported from practically all parts of the Belt that fields were clean and well cultivated, plants were developing satisfactorily although late in many areas, and, while weevils and other insects were present in many sections, actual damage was relatively small.

THE WEEVIL SITUATION IN THE U.S. COTTON BELT

The American Cotton Crop Service, commenting on June 23 upon the weevil situation in the U.S. cotton belt, stated as follows:—

"Cotton insect pests may or may not be the chief limiting factor in Texas cotton production for 1937. Weather conditions, of course, will determine largely the part insects will play. Concerning the insect outlook in Texas we quote a late report from Dr. F. L. Thomas, State Entomologist of Texas, as follows: 'Considering the State as a whole, conditions at the present time point to a year of considerable insect injury to cotton. Boll weevils are causing most injury in South Texas and flea hoppers in damaging numbers in practically all parts of the State excepting North-west, East, and South-east portions. Farmers in the Brazos bottoms have already begun to apply sulphur dust for flea hoppers.

Rainfall in the West-central and Central portions of the State has caused the plants to grow off rapidly and become favourable for an increase in numbers of flea hoppers.

Although too early to make definite statements regarding North-west Texas, it is believed that parts of that area will have some unfortunate experience with flea hoppers and leaf worms this year.

Thus far we have reports of leafworms only from Neuces and Calhoun Counties, but the second generation may be found in widely scattered areas any day now, and by another month the worms will be found causing injury in many parts of the State.'

The weevil situation in the Eastern Belt, especially along the Coastal Plains area from about Savannah, Ga., to Raleigh, N.C., threatens to hold the Georgia and Carolina production figures for 1937 to moderate proportions. One of the interesting features of the situation, in addition to the heavy initial infestation, is the fact that for the past four years very little weevil poisoning has been done due to climatic control of the pest. The result of climatic control of the weevil has apparently caught the farmers napping and, although a large number are poisoning, most of the poisoning operations were started from one to two weeks late. Therefore, in spite of warning from the Extension Department relative to the weevil situation, the best authorities now admit that the crop will

be reduced—the full extent depending on future weather conditions. A scorching hot, dry weather complex during the period June 15 to about July 15 would tend to hold the total damage down. However, should showery weather conditions prevail during the greater part of the June 15–July 15 period the crop will probably be reduced as much as 25 per cent. in the Coastal Plains section.

The unusually heavy initial weevil infestation in the Coastal Plains area of South Carolina is due mainly to two factors. Winter temperatures were not sufficiently low to produce any material mortality among the weevils that entered winter quarters. Secondly, the defoliation of the crop by the cotton leaf worm came at a date too late to reduce the numbers of weevils in the fields. This condition was also accentuated by the fact that the crop in large areas of South Carolina was very late.

The weevil infestation in Georgia appears to be unusually spotted with the most serious infestation reported from North-eastern Georgia or the section where the drought caused the crop to be four to six weeks late last year. The late-germinated 1936 crop maintained a very vigorous growing condition well up to the killing frost date and furnished unusual weevil multiplication conditions. In South Georgia, where the defoliation of the cotton plant by the cotton leaf worm, occurred during September and early October, the weevil population is reported as less than usual. In a few localities where defoliation of the cotton plant by the leaf worm was not general the initial infestation is comparatively heavy.

Mostly cloudy, showery weather conditions in the Central and Eastern Belts during the past week held maximum daily temperatures well down below the effective weevil-killing figures and the first weevil generation matured at a rapid rate. In South Texas some weevil-killing temperatures were recorded. However, from East Texas eastward daily temperatures were too low to affect the immature weevil stages in squares on the ground. In the southern half of the Belt the most critical period in the weevil's life history is from about June 15 to July 15. During this period immature stages of the first generation in squares on the ground are subjected to extreme heat conditions due to the relatively small size of the cotton plant. If daily maximum temperatures range from 94 degrees F. upward a very heavy mortality occurs among the immature stages. On the other hand, if showery weather conditions prevail, a very large percentage of the immature stages produce adult weevils for the first generation."

THE USE OF FERTILIZER IN THE U.S. COTTON BELT.

Fertilizers in the American cotton belt are being used this year more extensively than in any previous crop year since 1931. From the following table compiled by the New York Cotton Exchange Service it will be noted that the average yields of cotton per acre, when the crops have

been relatively poorly fertilized, have been higher than when the crops were more heavily fertilized in the earlier years.

Crop Year						Fertilizer used (Tons)	Raw Cotton Yield per Acre (pounds)
1928	..	..	..	..	..	2,221,000	163.3
1929	..	..	..	..	..	2,291,000	164.2
1930	..	..	..	..	..	2,254,000	157.1
1931	..	..	..	..	..	1,382,000	211.5
1932	..	..	..	..	..	867,000	173.5
1933	..	..	..	..	..	1,214,000	212.7
1934	..	..	..	..	..	989,000	171.6
1935	..	..	..	..	..	1,146,000	186.3
1936	..	..	..	..	..	1,312,000	197.9
1937	..	..	..	..	..	1,640,000	?

A PICTORIAL STORY OF TEXAS COTTON

Propaganda in favour of Texas Cotton is forthcoming in the shape of a publication by Messrs. Anderson, Clayton & Co., the well-known American firm of cotton exporters.

The book consists of a series of pictures, each with appropriate descriptive matter, and constitutes a pictorial story of Texas cotton from seed to mill. Every phase in the cultivation of the plant is involved, from the preparation of the land to the departure of the bales to mills in the United States or abroad. It would indeed be difficult to discover a collection of pictures which so aptly and completely cover the production of cotton.

Messrs. Anderson, Clayton & Co. are to be complimented on the publication of such a fine piece of work.

CROP REPORTS

The United States Department of Agriculture in its weather report for the week ended July 7, states :—

The past week was cool in the Eastern Cotton Belt and warmer than normal in the West. Substantial rains occurred in most places east of the Mississippi Valley, while in the Western half of the Belt except locally in some Northern Sections, the week was almost rainless.

The weather has been mostly favourable for cotton, and a fair to good advance is reported from most sections.

In Texas progress continued fair to good, and bolls were opening rapidly. Picking is progressing in the extreme South. In Oklahoma progress and condition continued fair to good, although there is complaint of grasshopper damage in some Western counties.

In Arkansas weather was favourable except for too much rain in the North-West. Plants are mostly strong, and are blooming in Southern and most Central portions. In the lower Mississippi Valley there was

generally dry and sunny weather, which was favourable for holding weevil in check.

From Alabama and Tennessee eastward there was considerable rainfall, and the increased moisture was beneficial in some localities, but favoured weevil activity in others.

Generally, however, weather was largely favourable, and the progress of cotton has been good in most places. Plants are squaring and blooming freely in Central Sections, while bolls are forming as far north as South Carolina, and there is scattered blooming into Northern Georgia and parts of Tennessee.

The American Cotton Crop Service, of Madison, Florida, stated as follows under date of July 14, 1937.

Reports from our crop observers for the week ending July 12 indicate the crop made average gain during the past week. There was some complaint of poor fruiting from western states but, for the Belt as a whole, no mention was made of the beginning of the annual midsummer condition decline. Weather conditions were mostly favourable. Temperatures were normal to above over the western half of the Belt and mostly somewhat below normal over the Eastern Belt. The showery weather condition and low temperatures prevailing over the Eastern Belt favoured weevil multiplication. From about Macon, Ga., north-eastward the first weevil generation usually begins to emerge or reach maturity about July 1, and showery weather and low temperatures greatly increase the number of weevils reaching maturity. Moisture conditions are mostly ample in all portions of the Belt except the north-western area, where rainfall is usually needed and, on account of much late-planted cotton, the need for adequate moisture is greater than usual. We have received no complaints of shedding due to dry weather conditions. Cotton insect pests such as weevil, boll worm, and cotton leaf worm, are increasing in Texas and will be a limiting factor in that state's outturn. Future weather conditions in the Eastern Belt will determine the extent of 1937 weevil damage in that area.

Messrs. Weil Brothers, of Montgomery, Alabama, in their semi-monthly crop letter dated July 1, 1937, state as follows :—

June is past, leaving behind a record of good cotton weather. There have been high temperatures, punctuated now and then by rains. Cultivation has been incessant, and more soda has been used in fertilisation than ever before. The consequence is that we have over the entire Belt, a plant that is well grown, strong, and in dark green health. The condition is spotted only in that the fruiting is not as yet up to expectations in some localities. We have never seen a better condition on the first of July and a recession is not to be unexpected. In no section is the crop late and it is a week earlier than normal in some few sections. The movement has begun in the Valley in Texas and indications are there will be a

20 per cent. larger yield. In South Alabama and South Georgia the movement should begin by August 15.

High temperatures have stopped the flea hopper in Texas, and have checked any damage by the weevil in the Central and Eastern Belts. Weevil emergence, however, is greater than for some years. Undoubtedly there will be some damage, regardless of any high temperatures to come, but with considerable rain and lower temperatures, certainly there will be wide and serious damage, and this may be a big factor in the final determination of the size of the crop.

A notable feature of this crop is the general use of better seed—more especially true in the Eastern Belt. Another feature is that farmers, despite higher prices, have been more unrestrained in the buying of equipment, fertilizer and other necessities, in their desire to make good crops. Another very progressive feature—the growing use of cover crops over the winter.

Messrs. Geo. H. McFadden & Bro., in their crop letter dated July 6, 1937, state as follows :—

The weather was partly favourable to favourable in the Eastern and Central Belts and generally favourable in the Western Belt. Moderately light to heavy showers fell over most of the Eastern and Central Belts during the first part of the week while the latter half, with the exception of the Carolinas, was clear. The principal complaint in these areas was cool nights and in some sections showers were conducive to weevil activity. In the Western Belt there were only a few widely scattered showers and, except where harvesting was interrupted in the extreme southern portion of Texas, the week was considered favourable.

A general rain would be beneficial in the Western Belt with some localities in south Texas becoming rather dry. The rest of the Belt needs clear warm weather although there are some sections, particularly in the northern portion, where moisture would favour crop progress.

With only a few local exceptions the crop is well cultivated. A good taproot has been developed although in a few areas in the south-east the root is only fair on late planted cotton. Plants are generally in healthy condition but continue to be inclined toward sappiness and some wilting is reported in southwest Texas. Squaring is general except in the northern third of the Belt and most cotton in the southern half is blooming freely with scattered blooms being reported in almost every section of the Belt. Fruiting is unsatisfactory in some areas, particularly in the southern portions of the Eastern and Central Belts.

Actual Weevil damage, except in a few localities, has been light to date, but the pest is reported in almost every section with infestation rather heavy in the south-east. With only a few exceptions our correspondents state that weevil are more threatening than at this time last year. Other insect reports are confined mostly to fleas and grasshoppers, damage from the former being mostly localised while the latter are causing considerable alarm in the western portions of Texas and Oklahoma.

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Mr. C. T. Revere, of Munds, Winslow and Potter, has communicated the following, dated July 9 :—

As we have so often warned our readers in the past, we do not issue crop estimates. In adhering to this policy, we should not regard it as a violation to indulge in tentative calculation as to yield possibilities, particularly as we feel that there is warrant for this process if based on logical premises. We herewith give below a picture of potentialities and our basis for same.

Last season total ginnings expressed in terms of equivalent 500 pound bales totalled 12,398,882 bales, or let us say 12,400,000 round numbers. This small production was not due to acreage restriction, as the area of 30,960,000 will testify. The poor showing came as a result of the exceptionally low yield per acre of Texas, 119 pounds, and Oklahoma 60 pounds per acre. Texas ginnings were 2,825,000 bales, and the Oklahoma crop was 289,000 bales. If the promise that existed at the end of June last year had been maintained, the combined yield of Texas and Oklahoma could have been at least 1,500,000 bales larger than the actual outturn.

In the tentative calculation we are making, we assume that Texas and Oklahoma which now have a much better foundation than existed a year ago will produce, *based on no acreage increase whatsoever*, at least 1,500,000 bales above their production last season. Let us go further and assume that the rest of the Belt, despite a more propitious early outlook, with heavier fertilisation and superior cultivation, turns out the same yield per acre as last season.

Thus we would have a crop of 12,400,000 bales plus 1,500,000 for the Texas-Oklahoma increment, or 13,900,000 bales.

Then add to this total 10% for acreage increase and we get a yield result of about fifteen and a quarter million bales.

Of course we expect no one to accept this presentation as a picture of even approximate yield indications. It does, however, in our opinion, present an excellent basis for calculations. Subtraction of several hundred thousand bales could be made for weevil damage, in case it develops, and still leave a prospect for fourteen and a half million bales. On the other hand, a propitious season in the remainder of July and August could raise the prospect to more than fifteen and a half million.

In setting forth this statistical venture, we recommend it only as an assemblage to be kept in mind as the season progresses. Unquestionably the fact that the acreage figures were below trade expectations will provide a temporary psychological stimulus that may disclose the scarcity of contracts incident to this stage of the season. If further incitement is required, this may be provided by reports of weevil ravages. We believe, however, that this pest will have to get exceedingly busy to impair the yield to such an extent that it will occasion anxiety over the requirements for American cotton during the coming season.

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EGYPTIAN COTTON

FINAL COTTON CROP ESTIMATE.

The Egyptian Ministry of Agriculture announce their final estimate of the Cotton Crop for 1936-37 (in Cantars) as follows :—

		1936-37	1935-36	1934-35	1933-34
Cotton over 1½ inch Staple	{ Sakel	520,100	901,137	1,002,452	1,153,223
	{ Others	2,335,600	1,754,483	1,215,258	978,930
Cotton over 1½ inch Staple	..	146,600	208,241	212,050	364,599
Cotton over 1½ inch Staple	..	5,901,100	5,478,537	4,960,760	5,914,316
TOTAL	.. ..	8,903,400	8,342,398	7,390,520	8,411,068
Scarto	.. ..	203,800	192,529	164,769	164,044
TOTAL including Scarto	..	9,107,200	8,534,927	7,555,289	8,575,112

AREA UNDER CULTIVATION

The Egyptian Ministry of Agriculture issued on July 15 its estimate of the area under cultivation to cotton this season, announcing a figure of 1,977,600 feddans, as compared with 1,715,805 feddans last season—an increase of about 15½ per cent. Details are shown in the following table (in Feddans) :—

		1937	1936	1935	1934
Lower Egypt	.. ..	1,265,900	1,127,287	1,112,834	1,174,896
Middle Egypt	.. ..	408,400	341,407	351,995	352,642
Upper Egypt	.. ..	303,800	247,111	204,176	204,420
TOTAL	..	1,977,600	1,715,805	1,669,005	1,731,958

TWO NEW GIZA VARIETIES.

Members of the International Cotton Federation will doubtless remember that reference has often been made in the past few issues of this journal to the new varieties of Egyptian cotton, especially Giza 12 and 26. In this connection, the following extract from a recent issue of the *Manchester Guardian Commercial* is of particular interest :—

Since the rise of Giza 7 to importance as a cotton variety, and the basing of contracts on it in both Liverpool and Alexandria, there has been a tendency, more especially in Liverpool and Manchester, to refer to Giza 7 as just "Giza." This ignores the fact that all the new selections of the Egyptian Ministry of Agriculture are given a Giza number, and it is noticeable that Alexandria references usually say Giza 7 when this variety is meant. The truth is that Giza 7 is only the first of new varieties, selected at Giza, which are going to be commercially important. Several others have been tried and dropped; some, like Giza 3, have been propagated for a few years and then withdrawn because their merits did not justify their continuance. The Giza Research Station now has, however, new strains which are virtually certain to command public interest. Two of these, Giza 12 and Giza 26, have already arrived at the stage where their merits deserve and require to be more widely known.

Although in point of area Giza 26 is the less important of the two, it comes at the top of the staple range, and therefore has an importance more than that of mere bulk. Actually 300 feddans, producing about 100 bales, were grown last season, and 1,800 feddans have been planted for the new season's crop, from which 1,000 bales may be expected. This variety is a top-staple one, and it is hoped that all users interested in this class of cotton will purchase test samples of the coming crop to see what value the cotton has to them. It is a fairly dark-coloured cotton, between Sakel and Maarad in colour, as long as Maarad but finer and stronger. Its results in spinning tests have been very consistent. Something like 5 to 10 per cent. increased yarn strength over that given

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by the equivalent grade of Sakel may be expected. Its real value is probably between the best Sakels and Sudans now used and Sea Island, and it may be expected to some extent to cut into the Sea Island market for top-quality yarns and fabrics.

What is expected of this variety in the future? Although, like most high-quality cottons, its agricultural merits are only moderate, yet it loses nothing to Sakel in this respect and may be expected to replace fairly rapidly whatever area of Sakel is still grown. It will then, of course, come into competition with Sakha 4, Maarad and Giza 7, and other varieties with better agricultural characteristics, so that it is not anticipated that a large acreage of this variety will ever be grown. But, of course, the principal deciding factor will be the premium which Giza 26 proves to be worth to the fine-spinning trade.

Giza 12 is perhaps a variety of greater general interest to users of Egyptian cotton. Of this new variety 6,000 feddans were grown in 1936, and 15,000 feddans or even more are expected to be sown with it this year. It is thus already of commercial importance, but it may be expected to make more progress. The merits of Giza 12 are principally agricultural. Its attractive early-maturing growth habit and unusually large boll make it in the Delta and in parts of Upper Egypt the most prolific of existing cotton varieties. Even Giza 7, which is itself a high yielder, is beaten by Giza 12, and the large areas of Delta Zagora, which have extended steadily in a period when staple only commanded a small premium and yield principally counted, may be expected to diminish in future in favour of Giza 12.

Although mainly attractive to the grower on account of its high yield, it must not be supposed that Giza 12 is without staple merits. Its staple is actually as long as Giza 7, but coarser and weaker, and it will always be worth less than Giza 7. It is, however, equally definitely a better cotton than Ashmouni. Actually it represents a new departure in staple characters, being long without fineness, but its general spinning value appears to be about half-way between Ashmouni and Giza 7.

Spinners will find points of attractiveness in Giza 12. It appears to card unusually well, and to be free from nep, probably owing to its relative coarseness. The large bulk in which Giza 12 is expected to be grown will make it a relatively cheap cotton, and spinners may often find that they can get the same yarn strength from medium-grade Giza 12 as from high-grade Ashmouni, at a cheaper price. Although darker-coloured than Giza 7, for uses where colour is unimportant, a mixture of Giza 7 and Giza 12 might also give interesting spinning results.

COMPLETION OF GEBEL AULIA DAM.

The long series of valuable irrigation projects, one of the chief features of British work in Egypt, has been still further increased by the completion

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of the Gebel Aulia Dam, on the White Nile, thirty miles south of Khar-tum, four months before the time stipulated in the contract. There is to be no official opening for the moment.

Mr. J. W. Gibson, a Yorkshireman, previously agent for Messrs. Pearson & Sons Ltd., of the Sennar Dam fame, whose tender of just over £2,000,000 was accepted by the Egyptian Government, later entered into partnership with Messrs. Pauling Ltd., and this new firm of Messrs. Gibson & Pauling (Foreign) Ltd. carried out the contract. Mr. Gibson undertook to complete the work in 50 months, and as the dam was officially started on June 26, 1933, the contractors had until August 26, 1937, and have thus finished well ahead of time.

The Gebel Aulia Dam, which is over three miles long, forms an important link in the Egyptian Government's " Nile Control " programme. Although it is situated in the Sudan, the latter will benefit practically not at all. Indeed, from a short-sighted point of view it will suffer, since a considerable amount of land near the dam will be inundated. But in this connection Egypt has already paid £E750,000 to the Sudan Government for the compensation of landowners, and it is expected that the vast majority of these will eventually settle in the Gezira, which is being rapidly developed by the Sudan Plantations.

From the Egyptian irrigation point of view, the Gebel Aulia Dam supplements the second heightening of the Assuan Dam, complete in 1933, in increasing the water stored for the summer by about 4,400,000,000 cubic metres, of which 2,400,000,000 is from the additional work at Assuan. The Gebel Aulia dam storage will be used gradually until it reaches its full capacity of 2,000,000,000 cubic metres in the summer of 1942 or 1943. And with this tremendous increase in the amount of water available there will be over 100,000 acres brought under cultivation, and irrigation in other places will be improved.

(Manchester Guardian)

INSECT DAMAGE TO EGYPTIAN CROP

Recent advices from Cairo state that about 119,000 acres of cotton are now affected by the boll-worm despite the strenuous efforts to check this menace.

It is maintained that the only way to combat it is to collect by hand the leaves which have been attacked and thousands of workers are engaged in this occupation.

Other cable advices dated Alexandria, June 3, state good progress is being made with the new crop, with weather satisfactory and leaf-worm damage negligible except in the Western Delta and Middle Egypt where, however, it has only been slight.

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COUNTRIES OF DESTINATION	TOTAL EXPORTS FROM THE BEGINNING OF THE SEASON $\left(\frac{1/9/36}{1/9/35}\right)$ TO THE SECOND WEEK OF JUNE $\left(\frac{16/6/37}{18/6/36}\right)$															
	SAKELLARIDIS		ASHMUNI		ZAGORA		GIZA 7		MAARAD		FOUADI		SAKHA 4		OTHER KINDS	
	1937	1936	1937	1936	1937	1936	1937	1936	1937	1936	1937	1936	1937	1936	1937	1936
England ..	25,816	42,703	165,649	139,879	72,256	73,285	92,415	52,675	4,860	5,675	3,084	4,914	4,612	6,773	9,350	14,905
British India ..	1,651	2,113	11,999	4,851	3,284	1,917	31,565	26,487	2,365	3,524	1,352	822	1,348	12	1,165	87
Austria ..	—	514	2,030	1,708	9,256	8,301	2,060	811	36	36	686	126	350	—	—	5
Belgium ..	100	70	6,465	3,726	4,141	2,937	1,592	643	20	—	—	—	—	—	1,882	553
Canada ..	—	—	1,400	3,100	—	—	1,390	800	500	250	—	100	—	—	—	—
China ..	800	675	11,840	9,560	550	880	2,235	3,110	150	50	—	—	—	—	—	—
Czechoslovakia ..	3,639	7,759	11,487	9,156	13,730	10,150	11,878	4,216	3,119	4,206	36	216	398	6	35	113
Estonia ..	35	5	2,760	1,575	435	125	45	105	—	—	—	—	—	—	—	25
France ..	7,952	15,533	54,262	73,562	34,847	30,575	20,784	11,845	2,897	4,334	1,250	2,732	413	410	3,221	5,181
Germany ..	4,534	6,078	32,728	25,891	16,389	28,397	20,728	17,939	835	2,016	1,070	3,659	1,621	259	1,049	1,518
Greece ..	—	30	2,330	1,864	658	502	35	40	—	—	—	5	—	—	126	63
Holland ..	—	51	334	567	1,733	593	735	588	60	15	—	—	—	—	4	—
Hungary ..	—	116	3,159	2,996	5,558	5,908	400	115	—	40	—	—	—	40	100	—
Italy ..	8,440	11,809	39,844	22,428	11,203	10,576	3,110	2,268	340	50	158	—	482	773	2,572	62
Japan ..	5,078	12,451	57,557	28,398	42,220	15,880	9,535	4,649	15,005	6,155	1,975	2,245	1,078	225	550	329
Poland ..	30	175	5,555	2,795	9,502	10,788	1,990	2,916	2,022	1,675	—	120	316	1,520	45	41
Portugal ..	1,450	1,292	380	690	897	741	313	299	355	554	35	—	80	30	94	—
Spain ..	—	5,316	—	32,282	—	13,109	—	3,385	—	190	—	170	—	676	—	59
Sweden ..	—	10	1,793	1,134	5,768	4,480	470	183	—	—	10	—	76	—	—	—
Switzerland ..	3,667	2,682	15,182	11,786	13,147	6,429	6,167	4,502	5,773	5,999	750	571	691	226	664	228
U.S.A. ..	3,509	5,020	2,632	6,635	—	265	25,066	16,603	4,164	1,345	—	—	2,497	1,056	26	1
Other Countries ..	298	194	10,864	3,454	29,014	16,346	1,157	362	313	190	277	—	175	—	384	554
TOTAL	66,999	114,566	440,280	388,037	274,618	242,684	233,670	154,601	42,814	36,264	10,723	15,680	14,137	11,965	21,207	23,824

CROP REPORTS.

The Commission de la Bourse de Minet-el-Basal, Cotton Committee,
Résumé of information received during June :—

LOWER EGYPT.—Influenced by the favourable temperature which prevailed throughout the month, cotton plants have shown satisfactory progress and development has been quite normal. Flowering has commenced in early sown crops. Throughout the whole of the Delta leaf-worm egg masses have been signalled. However, cultivators under Government supervision have taken active steps to combat the menace and the damage caused has been no more than normal. In several districts, confined principally to Sakellaridis cotton, a certain amount of damage has been reported from wilt with a number of cases of attacks of thrips. There are numerous complaints of insufficiency of water for irrigation purposes.

UPPER EGYPT AND FAYOUM.—The temperature has been favourable, the crop is well advanced and the condition of plants is very satisfactory. As in the Delta, egg masses of leaf-worm have been reported, but as previously stated, these have been effectually dealt with. Water is again said to be hardly sufficient for irrigation.

Messrs. Cicurel & Co., of Alexandria, have communicated the following under date of July 1, 1937 :—

Weather : The weather has been evenly warm and favourable to

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normal progress of the plant both in Lower and Upper Egypt. The crop is now as early as it was last season except in the Northern districts of the Delta where it is slightly late. In Upper Egypt, on the contrary, in certain districts, it is three to four days ahead of last year.

Aspect of the Plant : Normal conditions prevail everywhere and progress of the plant is satisfactory.

Leafage : Plentiful.

Blossoming : Started early in June and became general since.

Fruiting : Except in late fields of Lower Egypt, the plant has formed bolls equal in number to last year and if anything, showing in Upper Egypt better development.

Opening : No opening is reported so far, but it is expected that the crop will come to maturity in the first half of August in Upper Egypt and in the second half of the same month in Lower Egypt.

Irrigation : Although growers had some cause for apprehension in this regard at the beginning of the month, the water supply has since proved to be plentiful almost everywhere.

Damage : Leaf-worm layings increased considerably during the second half of the month ; but, owing to the very serious measures taken by growers with the help of Government Inspectors, they were not allowed to hatch and the damage caused is therefore practically nil.

The following market report, dated July 1, has been forwarded by *Messrs. Cicurel & Co.*, of Alexandria :—

A gradual improvement was recorded in the spot market and by the end of the fortnight ending July 1, business was quite active.

Giza 7.—The bulk of transaction consisted of *Giza 7* which was chiefly bought by Lancashire, France and Germany. With the present price of July *Giza* about 170 points under July *Sakel*, spinners find it very convenient to accumulate supplies of the former quality and it may be predicted that this interest will be maintained so long as the present state of things persists.

Ashmuni & Zagora : A short trade interest on both these growths caused some hasty covering during the last ten days. The basis improved from 100 to 150 points, according to grade. This rise more than offset the loss resulting from the disappearance of the June option and the advent of August, at a discount of about 50 points, as basis.

Sakel : This growth was rather neglected.

New Crop : Interest is broadening and a number of transactions have been concluded with many countries. The principal buyers are Lancashire, Germany and Italy, orders consisting chiefly of *Giza 7*, *Ashmuni* and *Zagora*. Except for September and October shipment, local exporters show little inclination to hedge their sales with purchases of forward deliveries from up-country. In this class of business only the basis for near delivery improved, therefore, while conditions in distant were unchanged or easier.

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STAPLE LENGTH OF INDIAN COTTON.

The Indian Central Cotton Committee have recently issued Statistical Leaflet No. 1, fourth issue (1936-37) (Price 1 anna) which contains a valuable report on the staple length of the Indian cotton crop of the 1936-37 season. Extracts from the data provided are published herewith in the accompanying table.

The particulars provided are based on the All-India Cotton Crop Estimates for the 1936-37 season, published by the Director-General of Commercial Intelligence and Statistics, Calcutta, and on information furnished by Directors of Agriculture regarding the production of improved varieties of cotton.

While it is not claimed, states the I.C.C.C. Secretary, Mr. P. H. Rama Reddi, that the method employed in the preparation of the report is at the moment scientific, it is felt that the classification of the Indian cotton crop into units in which the chief fibre characteristics of the crop may be considered as more or less homogeneous would facilitate the evolution of a more reliable method based on actual tests on representative samples of the season's fair average cotton of the commercial crop. The secretary adds that the Committee would greatly appreciate criticisms and suggestions calculated to enhance the value and usefulness of the publication.

It should be noted that in the accompanying table only the official Government estimates of production have been quoted. In the Report, from which these particulars are taken, private estimates also are given, although not in such detail. These generally are somewhat higher than the official estimates, and give a grand total of 7,408,000 bales.

The Indian Cotton Crop of 1936-37 Season Classified According to Length of Staple.

Based on the Provincial, State, and All-India Cotton Forecasts and on information specially supplied by the Provincial and State Departments of Agriculture

DESCRIPTION OF COTTON						Government estimated production (In thousand bales of 400 lb. each)
Trade Name	Staple length in.	Colour	Feel	Blow-room loss percentage	Spinning capacity	
LONG STAPLE—Over 1 in.						
(1) Punjab-American—280 F.— (including K.T. types)	..	Bright, creamy white	Soft, silky	9	30's warp or 40's weft	47
Total—Long staple	..					47
MEDIUM STAPLE A—1 in.						
(2) Sind Sudhar (290 F.-1)	32	Creamy white	Softish	8	32's warp	100
(3) Punjab-American—43 F.	32	White to creamy white	Soft	11	35's/40's warp	11
(4) Surti—Farm Cotton (1027 A.L.F. (part)	32	Very bright, white	Soft, silky	7-8	28's/30's warp	17
(5) Cambodia—Co. 2 (part) ..	32	Bright, slightly creamy	Good, soft	5-7	28's/30's warp	19
Total—1 in. in.	..					147
MEDIUM STAPLE B—1 in. to 3/4 in.						
(6) Surti—Farm Cotton (1027 A.L.F.) (part)	30 to 31	Very bright, white	Soft, silky	7-8	24's/28's warp	83
(7) Cambodia Co. 2 (part) ..	30	Bright, slightly creamy	Good, soft	5-7	24's/28's warp	56
(8) Punjab-American—L.S.S.	30	Creamy white	Soft, bodied	12	26's/30's warp	24
(9) Punjab-American—L.S.S.	30	White, brightish	Good	6-10	26's warp	39
(10) Western-Farm Cotton (Hageri-1)	28 to 30	Slightly creamy	Soft, bodied	10-12	24's warp	16
(11) Runungani-Farm Cotton (C-1, A-10 & KPT-1)	28 to 30	White to creamy white	Soft, bodied	6-8	24's warp	33
(12) Sind-American—F-98 ..	28 to 30	White	Soft, silky	5	26's warp	27
(13) B.D. 8 (pure)	28	White	Good, smooth	5-6	30's warp	4
(14) Upland—Farm Cotton (Gadag-1)	28	Creamy white	Good, bodied	7-8	24's/30's warp	14
(15) Hyderabad Georani ..	28	Creamy white	Good, soft	9-13	24's warp	141
(16) C.P. and Benar Cerum ..	28	White	Soft, good-bodied	9	30's/24's warp	37
(17) Surti ordinary ..	28	Creamy	Soft, slightly rough	6-7	30's/24's warp	87
(18) Cambodia, other than items (5) and (7)	28	Bright, slightly creamy	Good, bodied	5-7	32's/20's warp	127
(19) Kumpua-Dhuarwar, other than items (8) and (14)	28	Yellow-tinted	Soft, bodied	14-16	22's warp	100
(20) Northern ..	28	Creamy white	Good, soft	8	22's warp	51
(21) Timorvelles, other than item No. (11)	24 to 28	White	Full-bodied	6-8	16's warp 20's weft	125
(22) Punjab-American—4 F. ..	24 to 28	Whitish-creamy	Good-bodied	8-10	20's warp	787
(23) Sind-American—4 F. other than item No. (12)	24 to 28	White	Soft, silky	8-10	20's warp	170
Total—1 in. to 3/4 in.	..					1,908
Total—Medium Staple ..	..					2,055

SHORT STAPLE, A— $\frac{1}{8}$ in. to $\frac{1}{2}$ in.				than				6-8				14's/20's warp				37			
(24) Salams	Upland	— <i>vilayati</i>	(other	..	26 to 27	White to creamy white	Good	9-10	14's/20's warp	37									
(25) Dhurwar	Upland	— <i>vilayati</i>	(other	..	24	Creamy white	Good	9-10	18's warp or 20's weft	11									
(26) Gadag-1)	Central India	Malvi and Nimari	..	..	22 to 26	White	Full-bodied	10-12	14's/20's warp	306									
(27) Madras Westerns	(others than Hagari 1)	..	..	..	22 to 26	Creamy	Soft	11-13	16's warp	109									
(28) C.P. No. 1	Oomras	..	..	..	20 to 24	Creamy white	Silky	7-8	13's/16's warp	107									
(29) Dhollerse—Wagad	..	..	..	..	24 to 27	Bluish white	Soft, bodied	12-15	14's/18's warp	254									
(30) Hyderabad Kumpita-Dharwar	..	..	..	..	20 to 26	Creamy white	Good	14-16	14's/18's warp	2									
(31) Bisapur and Bagalkot Jowari	..	..	..	..	22	Creamy white	Silky	11-13	14's/18's warp	13									
(32) Broach-Kanvi	..	..	..	..	20 to 24	Very white	Silky	7-9	14's/18's warp	183									
(33) Banila	..	..	..	..	20 to 24	White	Soft, good-bodied	11-14	12's/16's warp	27									
(34) Coconadas and Warangal	..	..	..	..	20 to 26	White to dark brown	Harsh	11-14	16's warp	4									
(35) Bengals—N.W.F.P.	..	..	..	..	20 to 24	Creamy white	Silky	..	12's/14's warp	989									
Total— $\frac{1}{8}$ in. to $\frac{1}{2}$ in.				..	..	..	..	..	..	..	..	..	..	..	..	..	..	..	..
SHORT STAPLE, B— $\frac{1}{4}$ in. to $\frac{3}{4}$ in.				than				10-18				10's/12's warp				569			
(36) C.P. No. 2	Oomras	..	..	..	18 to 22	Good white	Moderately soft	10	10's/12's warp	97									
(37) C.P. No. 3	Oomras	..	..	..	10 to 18	White	Harsh	10	6's/8's warp	97									
(38) Hyderabad Westerns	..	..	..	..	18	Creamy white	Full-bodied	11-13	12's/14's warp	36									
(39) Khairabad Oomras	..	..	..	..	18	White to creamy white	Slightly rough	9-11	10's/12's reeling*	245									
(40) Khairabad Nagar Oomras	..	..	..	..	18	Creamy white	Slightly rough	9-11	10's/12's reeling	13									
(41) Hyderabad Oomras	..	..	..	..	18	Creamy white	Slightly rough	9-11	10's/12's reeling	319									
(42) Dhollerse—Mattheo	..	..	..	..	16 to 20	Creamy	Slightly rough	15	10's/12's reeling	287									
(43) Burmas	..	..	..	..	16 to 24	..	..	..	8's/10's warp	113									
Total— $\frac{1}{4}$ in. to $\frac{3}{4}$ in.				..	..	..	..	..	..	1,679									
SHORT STAPLE, C— $\frac{1}{2}$ in. and below.				than				9-10				8's/10's reeling				2			
(44) Bengals—Baqelkhand and Bundelkhand	..	..	..	..	12 to 20	Good white	Full-bodied	9-10	8's/10's reeling	2									
(45) Bengals—United Provinces	..	..	..	..	12 to 20	Good white	Full-bodied	9-11	8's/10's reeling	176									
(46) Bengals—Rajputana	..	..	..	..	12 to 20	Good white	Full-bodied	9-11	8's/10's reeling	85									
(47) Bengals—Sind (<i>dest</i>)	..	..	..	..	12 to 18	Whitest	Roughest	8-10	8's/10's reeling	221									
(48) Bengals—Punjab (<i>dest</i>)	..	..	..	..	16 to 18	Good white	Full-bodied	9-11	8's/10's reeling	1,056**									
(49) Bengals—Bihar and Orissa	..	..	..	..	12 to 16	Good white	White	..	8's/10's reeling	7									
(50) Bengals—Western Bengal	..	..	..	..	16	White	..	..	12's reeling	2									
(51) Comillas	..	..	..	..	12 to 16	White or Khaki coloured	Harsh	..	8's/10's reeling	37									
(52) Others	..	..	..	..	..	..	..	..	..	2									
Total— $\frac{1}{2}$ in. and below				..	..	..	..	..	..	1,587									
Total—Short Staple				..	..	..	..	..	..	4,205									
GRAND TOTAL				..	..	..	..	..	..	6,307†									

* Reeling is yarn spun for the Indian handloom industry.

† Adding the conventional estimate of 760,000 bales for the annual domestic consumption of cotton in India, the total estimated production during the current season comes to 7,408,000 bales according to private estimates as against 6,307,000 bales according to official estimates.

** Includes 846,000 bales of Mollins.

SUGGESTED TAX ON INDIAN COTTON BALES.

We learn from "Cotton," of Manchester, that according to reports dated Bombay, May 15, the Finance Member of the Government of Bombay has prepared a scheme, which includes a proposal for levying a tax of one rupee on each bale of ginned cotton, either consumed in or exported from the Bombay Presidency. He hopes, it is reported, to realise at least Rs. 50 lakhs from this source of taxation.

CROP REPORTS

Messrs. Ralli Brothers Limited, in their report dated July 13, 1937, state as follows, with regard to weather and crops :—

Oomras. During the first half of the week the weather remained fine but during the latter half general beneficial rains fell which will enable cultivators to complete their sowings. On the whole we estimate that 75 per cent. of the sowings in these areas has been completed.

Dhollerahs, Broach and Surtis. Beneficial rain has fallen everywhere being particularly heavy in the Surti district, where it was most required. Early sowings are progressing.

Dekkans. Except for scattered showers no rain has fallen and sowings are suspended. We estimate that so far only about 15 per cent. of the crop has been sown. Rain is urgently required and if it does not fall in the near future we expect sowings will be small and that land will be given over to groundnut sowings.

Tinnivellies and Cambodias. Hot dry weather has prevailed. Second pickings are arriving in the market.

Rangoon. The standing crops are progressing well.

Messrs. Volkart Brothers, Winterthur, Switzerland, in their report dated July 9, 1937, state as follows :—

The monsoon has started a few days later than normal on the West Coast. However, it has soon spread over the Omra districts and further North, and it may be said that so far the monsoon has taken a normal course. Farmers were able to sow their fields in time and by now sowings are almost completed. No definite information is available yet as to the acreage under cotton, but it is likely to be at least as large as last year.

The Gujerat belt (Broach Muttia) has received rather too much rain, so that planting there is somewhat delayed. There is plenty of time to make up for this delay.

In the Western tracts insufficient rain is preventing farmers from taking in hand the cultivation of their fields, but there is time in this district for sowing till middle of August.

In the Karachi-Hinterland conditions are satisfactory on the whole. The estimated acreage increase, as compared with last year, is put at from 5 to 10%. Satisfactory returns have induced farmers to grow more cotton. Only time will tell, however, whether the yield will be proportionately bigger. So far one can only note the tendency to grow more of the long staple varieties, both in the Sind and in the Punjab, at the expense of the ordinary 4F American Seed strain.

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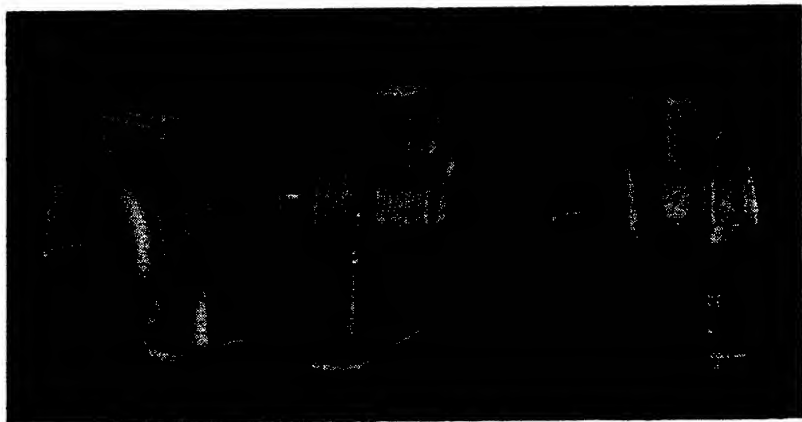
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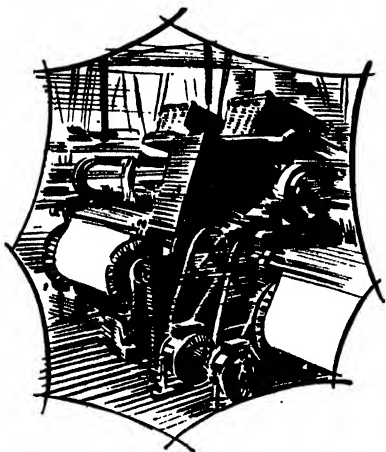
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THE SHIRLEY PATENT COTTON LINT RECOVERER.

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The following is extracted from the July issue of the *Textile Manufacturer* :—

The patents of the British Cotton Industry Research Association for the "streamline" cleaning of cotton have been previously described (INTERNATIONAL COTTON BULLETIN No. 47, April, 1934). The principles were then embodied in the "Shirley Analyser" for testing the content of fibre and trash of cottons or cotton waste. A production machine for the recovery of lint from waste is now available, and its use in mill practice shows that it will have considerable economic scope. Very extensive tests have been made, covering not only the capacity and efficiency of the machine, but also the effect in yarn appearance and strength when the recovered cotton is passed back into the usual mixings from which it came, or is put into a lower mixing, or is processed separately. The way in which it is used depends on each individual mill, but it is safe to say that the machine should be of interest to almost all cotton spinners whether in ordinary cotton spinning or in the waste trade. There is almost complete recovery of fibre in a clean condition.

The cleaning method is founded upon the relative buoyancy of lint or trash to be carried along in a current of air. After intensive opening, almost to the single hair state, the mixture of fibre and trash falls into a controlled "streamline" air current, proceeding from the air entry G, Fig. 1,* round the streamer plate to the cage at L. The heaviest particles pass downwards at once, practically undeflected by the stream, while the lighter trash particles gradually fall through the stream or are left at the turn where a centrifugal action effects a very critical separation of the lightest trash particles which are almost as buoyant as the cotton fibres. Light dust is carried with the air through the perforated cage L on which the fibre is deposited.

In practice, the material is fed from a hopper feeder of specially modified design on to the feed lattice A, Fig. 1, where preliminary compression takes place under the roller B, further compression taking place between the rollers C before reaching the feed roller D. The feed roller D

* See page 558.

is mounted upon a specially designed feedplate E which can be adjusted to suit the staple length delivering the material to a taker-in beater F. This beater is clothed with hardened pointed taker-in wire designed to perform the intensive opening required without damaging the staple.

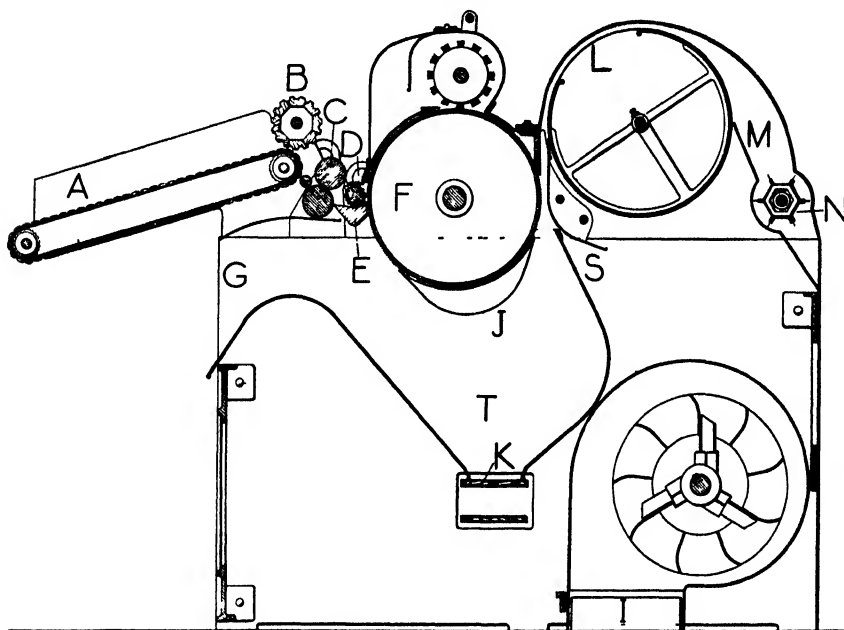


FIG. 1.

The control of the speed of the air stream is effected by a valve I near the fan, operated from the outside of the machine to a graduated scale, while the "streamlining" of the air flow and its guidance into a curved path are brought about by the general disposition of the working parts together with the arrangement and shape of the end partitions of the trash chamber and the streamer plate J. This latter is fitted close to the periphery of the beater, and serves to guide the air current from the beater in a path whose curvature assists the separation of the trash particles.

Some air is admitted at S, impinging on the main air stream at a sharp angle and producing eddies which combine with the action of the stripping knife to effect satisfactory stripping.

The trash falls to the bottom of the trash chamber T, from where it is conveyed by a travelling lattice K to the outside of the machine.

Where desired, a specially constructed elevator is supplied, facilitating the removal of the trash, which is deposited into a bag or skip placed beneath the mouth of the elevator. It is possible, however, to arrange a chute so that the conveyer lattice can deliver the trash into the room below.

The recovered lint is conveyed on the upward air stream to be collected on the cage L, which, being made of finely perforated metal, permits the light dust to pass to the fan and thence to dust chambers, whilst the lint is retained and conveyed towards the delivery sheet M, at which point it comes under the influence of the delivery roller N. The delivery may be arranged to feed into a pneumatic conveying system or into skips or on to a lattice conveyer, according to the arrangements in the mill.

The hopper feeder has been specially designed to give the maximum regularity of feed, the main features being improved combing by the spiked lattice, increased regularity by the regulating cylinder, and uniform stripping at the beater. Feeding of the material of uniform density across the full width of the machine obviates any possibility of plucking at the feedplate.

Production when dealing with blowroom droppings is 140 lb. to 180 lb. per hour, varying with the type and nature of the material. Operating card strips and similar wastes of greater lint content, a normal capacity is between 60 lb. and 80 lb. per hour. One operative can easily attend the machine when handling all the feed, delivered material and trash. With mechanical or pneumatic arrangements the labour can be further reduced. In some cases machines might be coupled in sequence, in which case there might be more than one preliminary machine to each final machine, as the bulk might, of course, be very greatly reduced by the extraction of trash.

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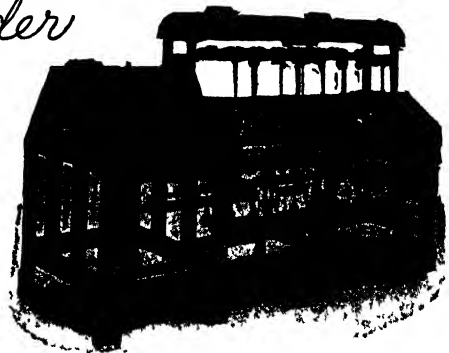
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THE SACO-LOWELL LAP METER.

The Saco-Lowell Lap Meter is a new precision instrument designed and built in the Saco-Lowell Shops at Biddeford. It is designed to divide laps into uniform, regular, predetermined lengths and to weigh each length immediately on being detached.

To accomplish this, the machine is composed of three assemblies: the frame, the unrolling and measuring motion, and the scale.

The frame is built of steel, finished in grey baked enamel with black trimmings.

The unrolling and measuring motion consists of a steel measuring cylinder and a pair of detaching rolls. There is a larger gear on the end of the shaft which supports the measuring motion. This gear carries one of the teeth of a hunting cog motion which, by means of a drop lever, stops the machine after the required length has been unrolled and deposited in the scale pan. After the weight has been recorded on the chart, the machine is easily started by means of a foot or hand lever. The measuring roll is covered with a material to give it a non-slipping surface. The measuring motion receives its power from a built-in motor and reduction gear.

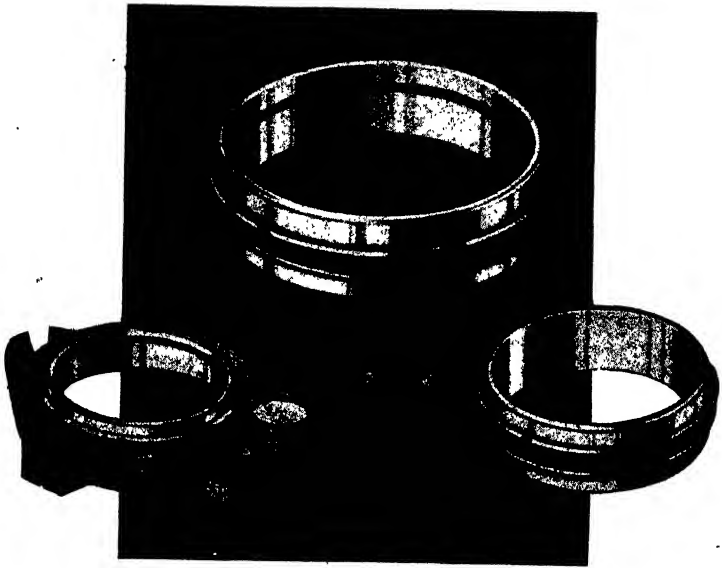
As the lap is slowly unrolled, and while it is on the way from the detaching rolls to the scale pan, it passes in front of a pair of high-intensity show-case lights. This arrangement makes it possible to examine the lap structure as regards uniformity of sheeting, cleanliness, the manner in which the cotton has been opened, and other details of this nature.

Should it be found necessary to stop the lap for a protracted examination, this can be done by means of a convenient switch located on the left-hand side of the machine.

The indicating scale used is an original design built especially for this machine. It embodies the latest ideas of scale manufacture. Accurate levelling is obtained by means of fine pitch screws and a built-in level. Brakes are provided to diminish the vibration of the scale and thus to facilitate accurate readings without loss of time for the scale to become stabilised.

The deviations from the standard weight are indicated on the illuminated scale, which is graduated in divisions equivalent to $\frac{1}{4}$ ounce. In other words, if the standard weight of the lap is 13 ounces, the scale is adjusted for 13 ounces by means of a standard weight. For example, if the yard of lap under examination weighs exactly 13 ounces, the indicator will remain exactly at 0 on the dial. However, should the sample under examination weigh more than 13 ounces, the indicator will move over to the proper place on the dial so that the deviation from the standard is immediately read. The same sequence of events will take place should the lap weigh less than 13 ounces. Thus, the variations are quickly and readily perceived without any calculations whatsoever.

In connection with this scale there is a special chart. The headings of this chart correspond exactly to the divisions of the scale, so that all



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the operator has to do is to read the scale and put a dot in the corresponding position on the chart. Therefore, when the test is completed, without any further loss of time for calculations, a graph record is easily obtained by joining the various dots. This operation can be carried on at a very high rate of speed. This rate depends more or less on the speed at which the operator can record the observations.

It has been the custom in the past to evaluate the uniformity of laps by "Total Variation." This method consisted of tabulating the yard-per-yard weight and by subtracting the smallest weight from the largest, a figure would be obtained which was called "Total Variation." This system of evaluating laps does not give a true picture of the lap structure. It assigns no importance whatever to the number of yards within the predetermined tolerance of variation. This, after all, is the true index of perfection and not the percentage of variation which depends on the difference between a maximum weight and a minimum weight.

Under the old system a lap with 50 per cent. of its yardage outside of the predetermined tolerance would be valued in exactly the same manner as a lap with 3 per cent. of its yardage beyond the predetermined tolerance.

In this new system of evaluating laps based on the operation of the Saco-Lowell Lap Meter the essential figure is the percentage of yards within a predetermined tolerance and not a meaningless figure based upon the difference between a range of maximum and minimum weights.

In addition to showing the weight of each individual yard and its relation to the standard, the chart quickly reveals the trend of these weights. In other words, it will show whether the lap has a tendency to be very heavy at the start and light at the finish, or whether the yards in the middle have a tendency to vary from the standard either heavy or light. The observation and study of this trend will often lead to the discovery of irregularities in the control perhaps as far back as the automatic feeder.

(Saco-Lowell Bulletin)

CUT WEFT.

Mr. Stephen Major, in a contribution to the July issue of the *Textile Recorder*, deals with the subject of cut weft. He discusses the causes of weft cutting at the loom and explains how they may be prevented. He states that one of the chief causes of cut weft is defective shuttles and it is advisable to examine the shuttles in the first instance, when weft cutting occurs. The shuttles should be kept perfectly smooth and in good condition. Chipped and rough shuttles and warped and badly worn shuttles often result in weft cutting. The rough and chipped places should be filed and sand-papered until they are smooth and finished with an application of linseed oil. Worn shuttles should be trued up with a plane or in a special shuttle truing machine, for the importance of having a pair or set of shuttles of the same size, shape and weight cannot be over-



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emphasised. Shuttles which are excessively worn at the base should be scrapped, for in this case the shuttles will be too shallow and the cop or pilm will rub against the warp yarn and the shuttle race and result in the breakage of the weft.

In addition to defective shuttles, a wrong traverse of the shuttle is responsible for much cutting of the weft during weaving. If the shuttle lifts on entering the shuttle box or when it strikes the picker, the weft may get underneath or on top of the shuttle, with the result that it will be severed by the cutting action between the shuttle and some portion of the shuttle box. If the shuttle is not properly checked, i.e., if it is not brought to rest in a gradual manner, there is always the tendency for the weft to "balloon" and get trapped between the shuttle and shuttle box. When the shuttle is not running truly, weft cutting is almost certain to arise, sooner or later, and it behoves the weaver to be on the look out to inform the overlooker as soon as this type of defect becomes evident.

Another frequent cause of cut weft is a badly adjusted weft fork, and this is particularly the case when soft weft or weft of fine counts is being used. If the weft fork goes too far through the grid or if the prongs of the fork contact with the bars of the grid, weft cutting is likely to result. Assuming the weft is absent, the weft fork should be set so that the prongs just project through the grid, say $\frac{1}{4}$ in., when the sley is in its most forward position. The prongs should not under any circumstances touch the bars of the grid. The fork should be set at such a height that it will not touch the bottom of the grid or the sley when the hook end of the fork is raised but should be low enough for the weft to effect the necessary action on the fork prongs. It is essential that the fork prongs occupy a perpendicular position corresponding to that of the grid and that the prongs remain parallel to the grid bars throughout their action. Much trouble results from the fork prongs not occupying a perpendicular position, and this fault is caused by bent prongs, crookedly bored pin holes in the forks, and badly set fork holders.

Weft cutting is sometimes caused by the selvedge threads being drawn through the healds or reed wrongly, and by too many ends being drawn together through the heald eyes or the reed dents at the selvedge. Cramping of the selvedge yarns, together with uneven or badly timed shedding, will often result in cut weft, especially when the selvedge yarns are strong and the weft very fine or soft. Worn reed wires at the selvedge will also cause weft cutting, especially if the temples do not hold the cloth fell to the full width of the warp yarn in the reed. Faulty setting of the temples will also cause weft cutting. If the temples are set so that they touch the reed there is always the liability of the weft becoming trapped and severed between the reed and a temple, while if the temples are too far away from the reed there is a tendency for the reed wires at the selvedge to exert a cutting action on the weft when the beat up of the weft takes place. If the crank arms are slack or the crank or crank bearings are badly worn, the liability of the weft being nipped between the temple and the reed is greatly increased.

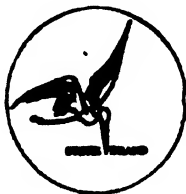
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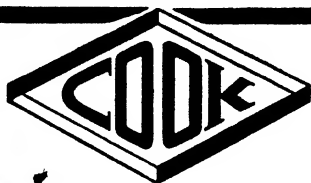
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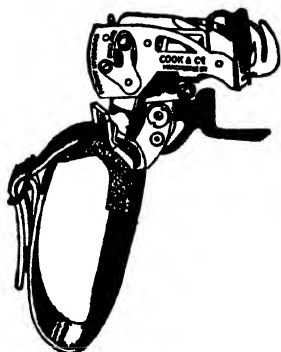
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QUANTITATIVE DETERMINATION OF STAPLE FIBRE IN MIXTURE YARNS BY MECHANICAL SEPARATION.

DR. KARIN SCHULZE (Melliand Textilberichte, Heidelberg, German edition, 1937, 7, 486). The authoress has found that a black-and-white effect can be produced on mixture yarns composed of cotton and viscose or cuprammonium staple fibre by dyeing them with a solution of iodine in aqueous potassium iodide, instead of a dyestuff. Unlike the cotton fibre, the viscose or cuprammonium staple fibre is dyed intensively and the shade is permanent, so that the coloured fibres can in that way easily be mechanically separated and counted. Staining is done as follows. The mixture yarn is laid for one minute in 150 cm³ of a solution containing 20 g. iodine in 100 cm³ of a saturated potassium iodide solution at 20°C., without having previously been wetted. The yarn is drawn through the solution, squeezed out and then washed out in two successive baths of 400 cm³ distilled water at 20°C. for one minute in each. The first rinsing bath should only be slightly moved, but the second rather more vigorously. The yarn is dried in the air.

MECHANICAL COTTON PICKERS

The following is extracted from an article written by Mildred G. Barnwell, Executive Assistant, Southern Combed Yarn Spinners' Association, and published in a recent issue of *Textile World*, the well-known U.S. textile publication.

There are three mechanical cotton pickers at about the same stage of development. Each is based on a rotating spindle theory: the Rust picker working on the plan of the smooth but dampened spindle, the International Harvester Co. picker and the Berry picker having barbed spindles which, rotating, pull the cotton from the boll. Each of the machines, however, has the same fundamental defect, the International and Berry pickers to an even greater degree than the Rust, for while they all pick cotton and pick it quickly they also pick it "trashy."

In the early part of the picking season when cotton stalks and leaves are still green the mechanical picker takes up a certain percentage of the foliage along with the cotton and often the leaves are crushed in the machinery and the cotton stained. In the latter part of the season, after the frost has fallen, dead leaves break and crumble into a fine "pepper trash" which will not come out of the cotton at the gin nor in some cases in the cleaning process at the mill. Cotton experts who have classed samples picked by all three machines state that in each case the cotton loses at least two grades in character representing an economic loss of at least \$20 a bale. The all-important cleaning problem must

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be solved before true merits or demerits of any machine picker can be thoroughly appraised.

Keeping the grade standard of mechanically picked cotton up to that of hand-picked is a most necessary step forward which must be taken before machines can be successfully adapted to cotton harvesting. Whether this will have to be done in a special cleaning process at the gin or whether it can be accomplished in some device on the picker itself has not been determined. In the former case it may be that specially constructed gins will have to be erected to care for machine harvested cotton.

It is believed that the Rust brothers think they can overcome this problem at the picker, for after months of exhaustive field tests during picking season and extensive laboratory tests at Clemson College, S.C., and College Station, Tex., they have decided not to build their pickers for the sales market this year but to continue development of their new model carrying a number of improvements that they find to be necessary. John Rust feels that after rigid tests this fall these improvements will warrant a production programme for 1938. Mack Rust is at this time in Turkestan acting as technical adviser to engineers assigned to adapting the machine to picking conditions of that country. The interest in the Rust picker shown by officials of the U.S.S.R. is very keen and no expense is being spared in pushing the mass production programme they have planned.

Although the Rust brothers have not promised mass production of their picker even after it is perfected to the United States, as they still adhere to their original leasing plan for this country, they are in agreement with the Soviet Government on a general production programme for the U S.S.R.

SPINNING TESTS ON MIXTURES OF STAPLE FIBRES AND INDIAN COTTONS

Dr. Nazir Ahmed, Director of the Technological Laboratory, Indian Central Cotton Committee has written an interesting report (Technological Bulletin Series—A. No. 36) on spinning tests carried out on mixtures of staple fibres and Indian cottons. In the introduction it is pointed out that the past few decades have witnessed a large increase in the use of artificial fibres as a supplement to or substitute for natural fibres, in which rayon has held the premier position. Rayon produced in short definite lengths, called staple fibre, increased from 8 million lbs. in 1931 to 21 million lbs. in 1932, and then to 156 million lbs. in 1935, which represented 15 per cent. of the total rayon output. This large increase is attributed to the fact that staple fibre possesses uniform length and cross section; it is clean and therefore there is very little waste and it does not adhere to the machine. But the more important reason is that it can be mixed and blended with cotton, wool, flax and silk

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and spun on the existing machines with some minor adjustments. The spinners, weavers, dyers and finishers can therefore produce a wide range of effects in conjunction with it.

In view of the increasing importance of staple fibre to the cotton textile industry some preliminary tests have been made using 3 types of staple fibre and 2 well-known varieties of Indian cotton.

The material used for the tests were :—(1) Cottons—two standard Indian cottons, viz., Jayawant and Combodia Co. 2. (2) Staple fibres :—Three types of staple fibres A, B, and C were used. These were about 1.5 deniers per filament and their staple lengths ranged between 1.20 inches to 1.44 inches. They were mixed with the cottons at the back of the first head of Draw Frame in the proportion of 1 : 2 and 2 : 1 and were spun into 20's and 30's counts with $3\frac{1}{2}$ and 4 twist multiples, the pure cottons and the pure staple fibres also being spun in the same counts for purposes of comparison.

The conclusions drawn from the results of the various tests made on the fibres and the yarns are as follows :—

(1) YARN BREAKAGES

The three staple fibres gave practically no breakages and their mixtures gave fewer breakages than the pure cottons. This was specially the case with the staple fibre A.

(2) YARN EVENNESS

The yarns from the three staple fibres were much superior to the cotton yarns in evenness and with an increase in the proportion of staple fibres in the mixture the evenness of the yarns improved.

(3) YARN NEPPINESS

The staple fibre yarns are absolutely free from neps and have a very smooth appearance. This property is transferred to the mixture yarns, although yarn-neppiness does not follow the simple additive law.

It is suggested that other considerations permitting the admixture of a small quantity of staple fibre may be used for reducing yarn breakages or yarn neppiness or improving yarn evenness in special cases.

(4) YARN STRENGTH AND YARN STRETCH

(a) *Staple fibres.* In these yarns a comparatively low lea strength is found to be associated with a much higher ballistic test than is met with in cotton yarns. The staple fibre yarns, however, have a much greater stretch than cotton yarns and the twist required to attain the maximum strength is lower than that for the cottons used in these tests.

(b) *Effect of increasing the proportion of staple fibres in the mixtures.* If the proportion of staple fibres is increased in the mixture, the lea strength and the single thread strength of the yarns spun from it decrease, while the ballistic work of rupture and the percentage extension increase. The decrease in the lea strength is generally greater in magnitude than the increase in the ballistic work of rupture.

(c) *Mixtures of staple fibres and cotton.* Different cottons responded differently depending upon their ballistic work of rupture and mean fibre length. The strength result of the mixtures were influenced by the disparity between the mean lengths of the cotton and staple fibre; the smaller the disparity the better the results.

The bulletin gives full details of the machinery employed in these tests and the results obtained are described and discussed in detail, copies of which may be obtained from Vulcan House, Nicol Road, Ballard Estate, Fort, Bombay, at 8 annas per copy.

INTERNATIONAL COTTON LOOM STATISTICS

In compiling the third International Cotton Loom Census, the method of procedure was similar to that employed in 1930 and 1933.

We regret that it has not been possible to obtain returns from Italy, Spain or the U.S.S.R., as well as from one or two minor South American and Asiatic countries.

It will be remembered that in 1933 we endeavoured, quite successfully, to obtain information regarding the number of cotton looms engaged in the manufacture of (a) mixtures of cotton and artificial silk, and (b) pure artificial silk. On this occasion we have attempted to obtain even more information upon this important and rapidly developing branch of the industry by sub-dividing these headings as follows :—

- (A) Number of looms weaving a mixture of cotton and filament artificial silk or rayon.
- (B) Number of looms weaving a mixture of cotton and spun artificial silk or staple fibre.
- (C) Number of looms engaged exclusively in the production of filament artificial silk or rayon.
- (D) Number of looms engaged exclusively in the production of spun artificial silk or staple fibre.
- (E) Number of looms specially constructed for the weaving of artificial silk or rayon goods only.

It should be borne in mind that all the above looms with the exception of those coming under the heading of (E), are capable of weaving cotton and so come within the scope of this inquiry. They are all situated in what are known to be cotton manufacturing concerns. Although we have had no difficulty in obtaining this information from the bulk of the more important cotton manufacturing countries, the information received from many of the smaller ones was either of too sketchy a nature or showed obviously that they did not thoroughly understand what was being asked of them. However, as a first attempt it has served a useful purpose and will no doubt be again included in the questionnaire in three years' time.

The total number of looms in the world shows little change, an increase of 10,526; Europe, however, shows a decrease of 34,378. Looms in Great Britain have declined by 83,191 in the three years. In U.S.A. there is shown a reduction of 40,181 looms. These decreases are offset by increases in U.S.S.R., Japan, China, India, etc. In this connection, however, it should be pointed out that the total number of looms for the U.S.S.R. which we published in 1933, i.e. 250,000, has been amended to 197,400, and the German total for 1933, i.e. 222,500, to 205,000.

The proportion of automatic looms to ordinary looms in Europe, appears to be increasing with remarkable steadiness.

Narrow looms below 16 inches, tape and elastic looms, are not included in this compilation, except in the case of Japan, for purposes of comparison.

The International Cotton Committee takes this opportunity of thanking all those who have contributed in any way to the success of this third World's Census of Cotton Power Looms.

N. S. PEARSE,

General Secretary.

July, 1937.

ESTIMATE OF NUMBER OF LOOMS IN PLACE (BASED ON ACTUAL RETURNS)

Country	Estimate of No. of Looms in Place (Based on Actual Returns) 31st Dec., 1936				Estimate of No. of Looms in Place (Based on Actual Returns) 31st Dec., 1933			
	Ordinary	Automatic	Automatic Attachments	Total	Ordinary	Automatic	Automatic Attachments	Total
EUROPE								
(1) Great Britain ..	483,984	15,224	5,565	504,773	570,429	13,994	3,541	587,964 (1)
(2) U.S.S.R.† ..	216,000	25,000	9,000	250,000	197,400	—	—	197,400* (2)
(3) Germany ..	169,800	18,200	12,500	200,500	176,700	16,100	12,200	205,000 (3)
(4) France ..	162,800	37,700	3,400	193,900 (a)	165,100	27,400	5,700	198,200 (4)
(5) Italy** ..	91,500	33,500	21,500	146,500	91,500	33,500	21,500	146,500 (5)
(6) Czecho-Slovakia ..	100,890	1,930	1,360	104,180	102,833	1,476	282	104,591 (6)
(7) Spain** ..	61,337	5,249	—	66,586	61,337	5,249	—	66,586 (7)
(8) Holland ..	45,829	3,671	1,667	51,167	51,806	3,116	1,038	55,960 (8)
(9) Belgium* ..	52,000	—	—	52,000	52,000	2,800	—	54,800 (9)
(10) Poland ..	25,535	10,714	64	36,313	30,941	7,353	317	38,611 (10)
(11) Switzerland ..	15,153	4,600	1,461	21,214	17,285	4,437	1,374	23,096 (11)
(12) Sweden ..	8,828	6,621	388	15,837	9,051	6,670	482	16,103 (12)
(13) Portugal ..	14,991	1,098	—	16,089	11,022	2,836	414	14,272 (13)
(14) Austria ..	8,508	1,707	870	11,085	10,727	1,906	445	13,078 (14)
(15) Hungary ..	11,500	1,500	1,000	14,000	12,440	60	—	12,500 (15)
(16) Yugo-Slavia ..	6,461	3,526	1,617	11,604	7,593	2,704	612	10,909 (16)
(17) Finland ..	6,113	1,745	48	7,906	6,391	878	—	7,269 (17)
(18) Estonia ..	4,757	120	502	5,379	4,867	123	513	5,503 (18)
(19) Roumania ..	14,500	—	—	14,500	4,120	70	—	4,190 (19)
(20) Denmark ..	3,190	690	84	3,964	3,223	677	86	3,986 (20)
(21) Greece ..	5,037	204	99	5,340	3,339	133	—	3,472 (21)
(22) Norway ..	2,291	646	43	2,980	2,217	705	33	2,955 (22)
(23) Turkey ..	1,858	—	—	1,858	1,378	—	—	1,378 (23)
(24) Bulgaria ..	3,459	—	—	3,459	1,153	—	—	1,153 (24)
(25) Latvia ..	932	—	—	932	968	—	—	968 (25)
(26) Lithuania ..	136	—	—	136	136	—	—	136 (26)
European Total ..	1,505,182	175,852	61,168	1,742,202	1,595,956	132,087	48,537	1,776,580

ASIA		292,564	40,000	—	332,564 (b)	256,343	21,000	—	277,343†
(1)	Japan ..	197,363	4,185	—	201,548	185,617	4,524	75	190,216
(2)	India and Ceylon ..	38,515	17,645	—	56,160	44,000	—	—	44,000
(3)	China ..	4,496	—	—	4,496	1,768	—	—	1,768
(4)	Korea ..	3,626	—	—	3,626	1,364	—	—	1,364
(5)	Manchukuo ..	490	—	—	490	490	—	—	490
(6)	Indo-China ..	800	—	—	800	300	—	—	300
(7)	Iran ..	116	—	—	116	—	—	—	—
(8)	Palestine ..	—	—	—	—	—	—	—	—
Asiatic Total ..		537,970	61,830	—	599,800	489,870	25,524	75	515,469
AMERICA		181,123\$	392,329\$	—	573,452	193,816	419,817	—	613,633
(1)	U.S.A. ..	74,246	4,160	2,497	80,903	75,337	3,159	3,396	81,892
(2)	Brazil ..	29,140	705	80	29,925	32,415	782	—	33,197
(3)	Mexico ..	1,833	22,976	—	24,809	12,027	13,444	16	25,487
(4)	Canada ..	3,223	1,223	—	4,446	3,638	174	—	3,812
(5)	Peru ..	1,767	518	—	2,285	1,854	515	20	2,389
(6)	Colombia ..	1,670	1,976	—	3,646	901	872	2	1,775
(7)	Argentina ..	1,429	—	300	1,729	1,517	—	—	1,517
(8)	Venezuela ..	820	480	—	1,300	560	120	—	680
(9)	Chile ..	1,224	—	—	1,224	608	—	—	608
(10)	Ecuador ..	246	—	—	246	448	—	—	448
(11)	Bolivia ..	235	—	—	235	210	20	—	230
(12)	Salvador ..	168	76	—	244	168	50	—	218
(13)	Uruguay ..	186	—	—	186	125	—	—	125
(14)	Guatemala ..	87	10	—	97	56	—	—	56
(15)	Costa Rica ..	—	—	—	—	—	—	—	—
American Total ..		297,397	424,453	2,877	724,727	323,678	438,953	3,434	766,065
(1)	Egypt ..	3,279	—	—	3,279	1,695	—	—	1,695
(2)	Australia ..	355	32	—	387	28	32	—	60
World's Total ..		2,344,183	662,167	64,045	3,070,395	2,411,227	596,596	52,046	3,059,869

* No separate figures given for Automatic and Automatic Attachments.

† No returns. Figures estimated from trade sources.

‡ Includes 109,000 looms only 15 in. wide.

§ Not including 5,630 linen looms usually working on cotton or a mixture of cotton and artificial silk, 850 of which are automatic looms and 250 fitted with attachments.

¶ These figures are approximate. Total forwarded by the Cotton Textile Institute of New York.

•• No returns 1933 total given

(a) Not including 8,900 linen looms usually working on cotton or a mixture of cotton and rayon, 3,200 of which are automatic looms and 360 fitted with attachments. Of this total 76 looms are indicated as working on cotton and rayon mixtures, and 4 on rayon exclusively. Looms belonging to the silk industry are not included in the French total given above.

(b) The total figure for Japan would appear to include narrow looms, which totalled 109,000 in 1933. The Japanese Association have returned the figure of 332,564 as being the total number of looms in that country, but state that particulars as to the number of ordinary and automatic looms are not available. The figures given under these headings are our own estimates and are only approximate.

IDLE LOOMS

(BASED ON ACTUAL RETURNS)

Country	Estimated No. of Looms Stopped (Based on Actual Returns) 31st Dec., 1936				Estimated No. of Looms Stopped (Based on Actual Returns) 31st Dec., 1933			
	Ordinary	Automatic	Automatic Attachments	Total	Ordinary	Automatic	Automatic Attachments	Total
Europe								
(1) Great Britain ..	83,065	1,321	394	84,780	155,140	2,437	195	157,772
(2) U.S.S.R. ..	No information	No information	†	35,000	No separate answer given	—	—	—
(3) Germany ..	35,000†	†	400	35,000	24,840	2,240	220	27,300
(4) France ..	26,900	1,320	—	28,620	40,000†	—	—	40,000
(5) Italy ..	No information	No information	100	35,440	53,676	135	155	53,966
(6) Czechoslovakia ..	35,250	90	—	—	10,998	441	—	11,439
(7) Spain ..	No information	No information	242	12,267	24,644	224	72	24,940
(8) Holland ..	12,016	9	—	—	No separate answer given	—	—	—
(9) Belgium ..	No figures given	No figures given	—	5,257	9,220	—	—	9,220
(10) Poland ..	5,257	—	15	4,805	4,785	478	91	5,354
(11) Switzerland ..	4,310	480	16	652	1,740	228	42	2,010
(12) Sweden ..	547	89	—	272	151	—	—	151
(13) Portugal ..	258	14	—	3,293	2,949	354	133	3,436
(14) Austria ..	2,938	337	18	—	Very few stopped	—	—	—
(15) Hungary ..	—	—	—	—	313	—	—	313
(16) Yugo-Slavia ..	—	—	—	—	833	260	—	1,093
(17) Finland ..	881	300	32	1,213	3,432	52	248	3,732
(18) Estonia ..	3,284	50	237	3,571	—	—	—	—
(19) Roumania ..	—	—	—	—	420	23	11	454
(20) Denmark ..	314	—	—	314	—	—	—	—
(21) Greece ..	10	—	—	10	244	3	—	3
(22) Norway ..	94	—	—	94	—	61	—	305
(23) Turkey ..	—	—	—	—	—	—	—	—
(24) Bulgaria ..	—	—	—	—	—	—	—	—
(25) Latvia ..	—	—	—	—	—	—	—	—
(26) Lithuania ..	—	—	—	—	—	—	—	—
European Total (with exceptions as indicated above)	210,124	4,010	1,454	215,588	333,385	6,936	1,167	341,488

ASIA							
(1) Japan ..	No information available	27,629	No information available	39,517	65	39,582	(1)
(2) India and Ceylon ..	27,607	22	—	39,517	65	39,582	(2)
(3) China ..	No information available	—	—	No information available	—	—	(3)
(4) Korea ..	—	—	—	—	—	—	(4)
(5) Manchukuo ..	—	—	—	—	—	—	(5)
(6) Indo-China ..	—	—	—	—	—	—	(6)
(7) Iran ..	—	—	—	—	—	—	(7)
(8) Palestine ..	82	—	—	—	—	—	(8)
Asiatic Total (with exceptions as indicated above)	27,689	22	—	39,517	65	39,582	
AMERICA							
(1) U.S.A. ..	13,977*	20,275*	—	No information available	673	10,093	(1)
(2) Brazil ..	6,986	218	24	9,420	—	10,093	(2)
(3) Mexico ..	247	—	—	271	4	275	(3)
(4) Canada ..	95	1,211	—	625	3,351	3,976	(4)
(5) Peru ..	—	—	—	8	—	8	(5)
(6) Colombia ..	—	—	—	47	—	47	(6)
(7) Argentina ..	—	—	—	—	—	—	(7)
(8) Venezuela ..	—	—	—	—	—	—	(8)
(9) Chile ..	—	—	—	128	—	128	(9)
(10) Ecuador ..	—	—	—	—	—	—	(10)
(11) Bolivia ..	—	—	—	—	—	—	(11)
(12) Salvador ..	—	—	—	—	—	—	(12)
(13) Uruguay ..	—	—	—	—	—	—	(13)
(14) Guatemala ..	—	—	—	—	—	—	(14)
(15) Costa Rica ..	—	—	—	—	—	—	(15)
American Total ..	21,305	31,704	24	10,499	3,355	14,527	
World's Total (with exceptions as indicated above)							
(1) Egypt ..	—	—	—	—	—	—	(1)
(2) Australia ..	—	—	—	28	—	28	(2)
World's Total (with exceptions as indicated above)	259,118	35,736	1,478	383,429	10,356	395,625	

* These figures are estimates.

† Cannot differentiate.

LOOMS IN COURSE OF ERECTION (BASED ON ACTUAL RETURNS)

Country	Estimated No. of Looms in Course of Erection (Based on Actual Returns) 31st Dec., 1936			Estimated No. of Looms in Course of Erection (Based on Actual Returns) 31st Dec., 1933		
	Ordinary	Automatic	Total	Ordinary	Automatic	Total
EUROPE						
(1) Great Britain	1,048	663	1,701	3,241	865	4,133
(2) U.S.S.R.	No information	No information	—	No separate answer given	—	—
(3) Germany	3,295	854	4,186+	931	853	1,819
(4) France	No figures given	—	—	No separate answer given	—	—
(5) Italy	No information	—	—	558	—	575
(6) Czechoslovakia	580	—	580	No records available	17	—
(7) Spain	No information	—	—	No separate answer given	—	—
(8) Holland	533	52	585	63	—	63
(9) Belgium	No figures given	—	—	No separate answer given	—	—
(10) Poland	—	—	—	—	—	—
(11) Switzerland	118	35	153	—	—	—
(12) Sweden	91	102	193	251	117	368
(13) Portugal	491	—	491	80	210	290
(14) Austria	166	202	424	20	—	20
(15) Hungary*	150	—	150	—	—	—
(16) Yugo-Slavia	—	—	—	—	—	—
(17) Finland	2	14	16	—	15	15
(18) Estonia	—	—	—	—	10	10
(19) Roumania	—	—	—	—	—	—
(20) Denmark	2	—	2	16	2	18
(21) Greece	—	—	11	16	—	16
(22) Norway	—	23	23	—	29	29
(23) Turkey	—	—	—	300	—	300
(24) Bulgaria	5	—	5	54	—	54
(25) Latvia	—	—	—	—	—	—
(26) Lithuania	—	—	—	—	—	—
European Total (with exceptions as indicated above)	6,481	1,935	8,520	5,580	2,101	7,710

ASIA							
(1) Japan ..	No information available	1,465	4,650	118	—	4,768	(1)
(2) India and Ceylon ..	1,440	—	—	—	—	—	(2)
(3) China ..	—	—	—	—	—	—	(3)
(4) Korea ..	—	—	—	—	—	—	(4)
(5) Manchukuo ..	—	—	—	—	—	—	(5)
(6) Indo-China ..	—	—	—	—	—	—	(6)
(7) Iran ..	—	—	—	—	—	—	(7)
(8) Palestine ..	—	—	—	—	—	—	(8)
Asiatic Total (with exceptions as indicated above)	1,440	25	1,465	4,650	118	—	4,768
AMERICA							
(1) U.S.A. ..	No information available	134	—	No information available	35	—	(1)
(2) Brazil ..	1,186	—	1,320	882	—	917	(2)
(3) Mexico ..	184	—	184	—	—	—	(3)
(4) Canada ..	—	81	81	—	1,016	1,016	(4)
(5) Peru ..	—	—	—	87	130	217	(5)
(6) Colombia ..	45	100	145	27	120	147	(6)
(7) Argentina ..	—	380	380	7	68	75	(7)
(8) Venezuela ..	—	—	—	—	—	—	(8)
(9) Chile ..	—	—	—	—	240	240	(9)
(10) Ecuador ..	—	—	—	—	—	—	(10)
(11) Bolivia ..	—	—	—	—	—	—	(11)
(12) Salvador ..	—	—	—	—	—	—	(12)
(13) Uruguay ..	—	—	—	—	20	20	(13)
(14) Guatemala ..	—	—	—	—	—	—	(14)
(15) Costa Rica ..	—	—	—	22	10	32	(15)
American Total (with exceptions as indicated above)	1,415	561	2,110	1,025	1,604	35	2,664
(1) Egypt ..	—	—	—	—	—	—	(1)
(2) Australia ..	80	—	80	—	—	—	(2)
World's Total (with exceptions as indicated above)	9,416	2,521	12,175	11,205	3,823	114	15,142

* No separate figures given for Automatic and Automatic Attachments. † Mainly replacing obsolete looms.

NUMBER OF COTTON LOOMS ENGAGED IN THE PRODUCTION OF:—

Country	(a) Cotton and filament artificial silk or rayon	(b) Cotton and spun artificial silk or staple fibre	(c) Filament artificial silk or rayon	(d) Spun artificial silk or staple fibre	Looms specially erected for weaving artificial silk or rayon goods only
Great Britain ..	21,863	6,976	28,381	7,065	9,684
France	9,000*	1,020*	280*	1,230*	115
Czecho-Slovakia ..	7,850	520	4,310	335	670
Holland	554	245	610	328	554
Switzerland ..	762	285	119	271	12
Sweden	374	411	193	910	67
Portugal	358	36	—	—	—
Austria	1,030	63	45	8	—
Hungary	4,000 to 5,000	—	About 1,000	—	2,000
Yugo-Slavia ..	332	—	11	—	286
Finland	49	6	14	30	14
Denmark	125	56	20	105	206
India	3,722	321	21	10	26
Norway	7	—	58	79	12
U.S.A.	—	—	About 4	6,000	—
Mexico	291	525	147	82	84
Canada	798	—	—	—	203
Peru	22	—	—	—	13
Argentina	—	68	—	—	14
Chile	—	25	—	—	—

* Subject to essential variations.

AVERAGE HOURS WORKED PER WEEK AND AVERAGE HOURS IN NORMAL WORKING WEEK

(Actual returns only.)

COUNTRY	AVERAGE HOURS WORKED PER WEEK		AVERAGE NORMAL WORKING HOURS PER WEEK WHEN ON FULL TIME		PERCENTAGE OF NORMAL FULL TIME ACTUALLY WORKED	
	1936	1933	1936	1933	1936	1933
Great Britain ..	39.18	34.42	48.94	48.90	80.00	70.4
U.S.A. ..	79.00	50.01	80.00	80.00	98.75	62.5
Germany ..	42.29	46.00	48.00	48.00	88.10	95.8
France ..	36.82	38.50	48.00*	48.00	76.70	80.2
Italy ..	§	35.75	§	54.17	§	66.0
Czecho-Slovakia ..	30.93	22.35	48.00	48.00	64.44	46.5
Holland ..	42.38	24.40	55.81	49.82	75.94	48.9
Poland ..	38.31	46.13	66.44	61.17	57.66	75.4
Switzerland ..	44.77	36.18	48.00	48.00	93.27	75.3
Sweden ..	75.57	55.97	64.81	63.71	116.60	87.8
Portugal ..	46.43	50.54	48.00	57.76	96.73	87.5
Austria ..	58.01	39.94	48.00	55.16	120.85	72.4
Hungary ..	56.00	56.00	56.00	56.00	100.00	100.0
Yugo-Slavia ..	79.41	65.25	74.80	64.00	106.16	101.9
Estonia ..	17.38	15.70	46.50	51.33	37.37	30.6
Finland ..	37.01	37.06	50.67	47.12	73.04	78.6
Roumania ..	51.00	55.00	51.00	55.00	100.00	100.0
Denmark ..	58.73	§	48.00	§	122.35	§
Greece ..	47.31	57.50	58.00	58.40	81.57	98.5
Norway ..	51.23	39.07	48.00	48.00	106.73	81.3
Latvia ..	§	92.00	§	102.71	§	89.6
Bulgaria ..	96.00	96.43	96.00	100.00	100.00	96.4
India ..	§	§	See	60.00	§	§
Footnote						
Brazil ..	50.87	34.26	57.87	56.51	87.90	60.6
Mexico ..	62.40	52.03	62.04	65.05	100.58	80.0
Canada ..	85.64	58.82	87.40	64.89	97.98	90.6
Colombia ..	62.36	59.70	68.00	60.40	91.70	98.8
Peru ..	46.78	43.96	48.43	48.00	96.59	91.5
Argentina ..	70.67	55.80	65.25	61.87	108.30	90.2
Ecuador ..	§	60.00	§	60.00	§	100.0
Venezuela ..	48.00	§	48.00	§	100.00	§
Uruguay ..	§	47.75	§	49.00	§	97.4
Costa Rica ..	§	51.00	§	51.00	§	100.0
Australia ..	44.00	25.60	44.00	44.00	100.00	58.1
Turkey ..	§	68.84	§	99.00	§	69.5
Chile ..	48.00	34.92	48.00	48.00	100.00	72.7
Palestine ..	34.00	§	48.00	§	70.83	§

* 40 hours per week commencing January 1st, 1937.

India.—54 hours per week constitute the working week in British India. In the Native States of Baroda, Kathiawar, Indore, Gwalior, Hyderabad, and Travancore, 60 hours per week are worked, as is the case in Ceylon.

§ Not available.

ESTIMATE OF NUMBER OF LOOMS IN PLACE IN 1930

(BASED ON ACTUAL RETURNS)

Country	Estimate of No. of Looms in Place (Based on Actual Returns) 31st Dec., 1930			
	Ordinary	Automatic	Automatic Attachments	Total
EUROPE				
(1) Great Britain	678,794	11,810	2,295	692,899 (1)
(2) Russia	159,100	—	—	159,100 (2)
(3) Germany	181,461	24,626	—	206,077 (3)
(4) France	182,600	17,500	—	200,100 (4)
(5) Italy	119,700	20,300	6,500	146,500 (5)
(6) Czecho-Slovakia	122,550	1,600	850	125,000 (6)
(7) Spain	81,035	—	—	81,035 (7)
(8) Holland	52,323	2,060	447	54,839 (8)
(9) Belgium	54,385	—	—	54,385 (9)
(10) Poland	40,444	—	642	41,086 (10)
(11) Switzerland	18,649	4,236	950	23,835 (11)
(12) Sweden	11,639	6,785	219	18,643 (12)
(13) Portugal	16,726	75	3	16,804 (13)
(14) Austria	12,321	1,340	254	13,915 (14)
(15) Hungary	12,000	60	—	12,060 (15)
(16) Yugo-Slavia	7,633	3,434	680	11,747 (16)
(17) Finland	6,468	674	—	7,142 (17)
(18) Estonia	9,559	58	—	9,617 (18)
(19) Roumania	5,580	230	—	5,810 (19)
(20) Denmark	3,431	686	98	4,215 (20)
(21) Greece	3,421	79	—	3,500 (21)
(22) Norway	2,523	727	56	3,306 (22)
(23) Turkey	1,220	—	—	1,220 (23)
(24) Bulgaria	1,277	—	—	1,277 (24)
(25) Latvia	2,214	—	—	2,214 (25)
(26) Lithuania	—	—	—	— (26)
Total	1,787,043	96,289	12,994	1,896,326
ASIA				
(1) Japan	166,466	15,000	7,000	188,466† (1)
(2) India	177,954	1,715	13	179,682 (2)
(3) China	29,582	—	—	29,582 (3)
(4) Korea	1,766	—	—	1,766 (4)
(5) Manchukuo	—	—	—	— (5)
(6) Ceylon	538	—	—	538 (6)
(7) Indo-China	500	—	—	500 (7)
(8) Persia	—	—	—	— (8)
Total	376,806	16,715	7,013	400,534
AMERICA				
(1) U.S.A.	133,681	532,176	33,148	698,955 (1)
(2) Brazil	75,324	2,362	260	77,946 (2)
(3) Mexico	30,634	806	—	31,440 (3)
(4) Canada	10,201	11,403	14	21,618 (4)
(5) Peru	8,190	30	—	3,220 (5)
(6) Colombia	2,546	1,140	—	3,686 (6)
(7) Argentine	1,323	102	30	1,455 (7)
(8) Venezuela	1,417	—	—	1,417 (8)
(9) Chile	400	—	—	400 (9)
(10) Ecuador	1,218	—	—	1,218 (10)
(11) Bolivia	400	—	—	400 (11)
(12) Salvador	150	—	—	150 (12)
(13) Uruguay	114	—	—	114 (13)
(14) Guatemala	125	—	—	125 (14)
(15) Costa Rica	40	—	—	40 (15)
Total	260,713	548,019	33,452	842,184
(1) Egypt	1,234	—	—	1,234 (1)
(2) Australia	500	—	—	500 (2)
World's Total	2,426,296	661,023	53,459	3,140,778

† Includes Narrow Looms.

COTTON TRADE STATISTICS

JAPAN.

EXPORTS OF COTTON PIECEGOODS (BY DESTINATION) FROM
JAPAN FOR THE FIRST QUARTER OF 1936 AND 1937
(In 1,000 square yards)

ASIA	1936	1937	Change	Do. %
Manchoukuo	63,234	61,110	— 2,124	— 3·3
Kwantung Province ..	25,897	35,647	+ 9,750	+ 37·6
The Republic of China..	12,219	17,999	+ 5,780	+ 47·3
Hongkong	18,181	10,821	— 7,360	— 40·5
Siam	21,980	19,737	— 2,243	— 10·2
British Malaya	238	56	— 182	— 76·5
The Straits Settlements..	10,241	10,384	+ 143	+ 1·4
British India	124,920	70,262	— 54,658	— 43·8
Ceylon	2,258	1,564	— 694	— 30·7
Iran	1,148	7,620	+ 6,472	+ 563·8
Iraq	14,240	19,425	+ 5,185	+ 36·4
Syria	10,160	14,190	+ 4,030	+ 39·7
Palestine	5,754	2,334	— 3,420	— 59·4
Arabia	2,981	3,605	+ 624	+ 20·9
Aden	18,175	12,441	— 5,734	— 31·5
Cyprus	—	—	—	—
Philippines	8,479	16,302	+ 7,823	+ 92·3
British Borneo	129	65	— 64	— 49·6
Netherlands Indies	70,676	116,042	+ 45,366	+ 64·2
EUROPE				
Britain	6,256	4,010	— 2,246	— 35·9
France	618	999	+ 381	+ 61·7
Germany	5,574	5,119	— 455	— 8·2
Italy	2,190	877	— 1,313	— 60·0
Belge-Luxemburg Economic Union	4,849	2,381	— 2,468	— 50·9
Sweden	2,196	3,023	+ 827	+ 37·7
Norway	2,132	1,844	— 288	— 13·5
Gibraltar	252	571	+ 319	+ 126·6
Greece	1,649	196	— 1,453	— 88·1
Turkey	4,838	1,637	— 3,201	— 66·2
Malta	1	—	— 1	— 100·0
NORTH AMERICA				
U.S.A.	12,637	49,591	+ 36,954	+ 292·4
Mexico	90	916	+ 826	+ 917·8
Guatemala	30	12	— 18	— 60·0
Honduras	1,123	3,423	+ 2,300	+ 204·8
Salvador	—	5	+ 5	—
Nicaragua	165	810	+ 645	+ 390·9
Costa Rica	1,064	1,382	+ 318	+ 29·9
Panama	1,049	970	— 79	— 7·5
Panama Canal Zone ..	198	108	— 90	— 45·5
Cuba	58	62	+ 4	+ 6·9
Jamaica	13	4	— 9	— 69·2
Haiti	855	2,457	+ 1,602	+ 187·4
Dominican Republic ..	1,835	4,657	+ 2,822	+ 153·8
Bahamas	—	—	—	—

EXPORTS OF COTTON PIECEGOODS (Japan)—*continued*

NORTH AMERICA—(cont.)			1936	1937	Change	Do. %
Porto Rico	..	..	2,915	5,243	+ 2,328	+ 79.9
St. Vincent	..	..	1	—	1	—100.0
Trinidad & Tobago	..	..	1	3	+ 2	+ 200.0
SOUTH AMERICA						
Peru	..	..	1,323	926	— 397	— 30.0
Chile	..	..	7,179	3,976	— 3,203	— 44.6
Argentina	..	..	16,548	19,456	+ 2,908	+ 17.6
Uruguay	..	..	2,148	1,971	— 177	— 8.2
Venezuela	..	..	3,118	6,873	+ 3,755	+ 120.4
Columbia	..	..	—	23	+ 23	—
Ecuador	..	..	3,693	293	— 3,400	— 92.1
AFRICA						
Egypt	..	..	19,914	12,951	— 6,963	— 35.0
Anglo-Egyptian Sudan	..	..	15,667	15,228	— 439	— 2.8
Eritrea	..	..	—	—	—	—
French Somali Coast	..	..	7,891	460	— 7,431	— 94.2
Italian Somaliland	..	..	52	—	— 52	—100.0
Kenya, Uganda, & Tanganyika	..	..	26,530	14,825	—11,705	— 44.1
Mozambique	..	..	3,301	3,113	— 188	— 5.7
Union of South Africa	..	..	5,908	5,200	— 708	— 12.0
Nigeria	..	..	710	1,074	+ 364	+ 51.3
Gold Coast	..	..	406	57	— 349	— 86.0
French Morocco	..	..	14,721	4,987	— 9,734	— 66.1
Spanish Morocco	..	..	1,545	13	— 1,532	— 99.2
Algeria	..	..	596	408	— 188	— 31.5
Madagascar & Reunion	..	..	30	5	— 25	— 83.3
OCEANIA						
Australia	..	..	20,164	5,724	—14,440	— 71.6
New Guinea	..	..	657	253	— 404	— 61.5
New Zealand	..	..	1,399	2,274	+ 875	+ 62.5
Hawaii	..	..	407	551	+ 144	+ 35.4
Others	..	..	18,878	22,658	+ 3,780	+ 20.0
Total Exports	..	..	636,281	633,198	— 3,083	— 0.5

Source: Monthly Returns of the Foreign Trade of Japan.

WORLD TRADE IN RAW COTTON

(Statistics issued by the United States Dept. of Agriculture.)

EXPORTS (IN BALES) FOR THE FIRST NINE MONTHS OF THE COTTON SEASON

Export Countries	Season 1936-37	Season 1935-36	10-Year Average
U.S.A.	4,985,000	5,424,000	7,091,000
India	2,711,000	2,521,000	2,085,000
Egypt	1,589,000	1,384,000	1,192,000
Brazil	654,000	420,000	77,000
Peru	204,000	234,000	136,000
Argentina	128,000	118,000	46,000
Total	10,271,000	9,101,000	10,627,000

PERCENTAGES OF WORLD-TOTAL EXPORTS

Export Countries	Season 1936-37	Season 1935-36	10-Year Average
U.S.A.	49%	55%	67%
India	26%	23%	20%
Egypt	16%	14%	11%
Brazil	6%	4%	1%
Peru	2%	3%	1%
Argentina	1%	1%	—(1/2%)

EXPORTS (IN BALES) DURING THE AFORE-MENTIONED PERIOD
TO THE FOLLOWING PRINCIPAL IMPORTING COUNTRIES

FROM U.S.A. TO—	Season 1936-37	Season 1935-36	10-Year Average
Japan	1,410,000	1,378,000	1,140,000
England	1,068,000	1,210,000	1,604,000
Germany	602,000	709,000	1,638,000
France	664,000	650,000	786,000
FROM INDIA TO—			
Japan	1,530,000	1,127,000	1,008,000
England	363,000	331,000	130,000
Germany	121,000	192,000	143,000
France	91,000	114,000	105,000
FROM EGYPT TO—			
Japan	200,000	90,000	55,000
England	546,000	473,000	469,000
Germany	120,000	126,000	86,000
France	177,000	195,000	154,000
FROM BRAZIL TO—			
Japan	68,000	6,000	—
England	200,000	101,000	—
Germany	197,000	175,000	—
France	30,000	26,000	—

INDIA.

IMPORTS OF COTTON YARNS AND PIECEGOODS INTO INDIA DURING THE TWELVE MONTHS 1ST APRIL, 1936 TO 31ST MARCH, 1937. (PREPARED BY HIS MAJESTY'S SENIOR TRADE COMMISSIONER IN INDIA AND PUBLISHED BY THE DEPARTMENT OF OVERSEAS TRADE.)

COTTON YARNS

The total imports both in quantity and value registered a very considerable fall in the period under review, from 44 million lbs. valued at Rs.371.2 lakhs to 28 million lbs. valued at Rs.255 lakhs. The share of the United Kingdom fell from 9.7 million lbs. value Rs.97.4 lakhs to 7.6 million lbs. value Rs.78.8 lakhs. The imports from Japan fell from 21 million lbs., value Rs.179.2 lakhs to 16 million lbs., value Rs.137.4 lakhs. The share of China fell very considerably from 13.4 million lbs., value Rs.93.9 lakhs to 5 million lbs., value Rs.38.2 lakhs.

GREY PIECEGOODS (PLAIN GREY)

The total imports registered a considerable fall, from 212 million yards, value Rs.265 lakhs, to 167 million yards, value Rs.202 lakhs. Practically the whole of this trade is enjoyed by Japan whose sendings fell from 189 million yards valued at Rs.235 lakhs to 155 million yards valued at Rs.183 lakhs. The small share of the United Kingdom trade fell from 22 million yards valued at Rs.29 lakhs to 12 million yards valued at Rs.19 lakhs.

GREY PIECEGOODS (BORDERED GREYS)

Here, again, there was a substantial reduction in the total imports during the year ended March, 1937, as compared with the preceding year, from 119 million yards, valued Rs.168 lakhs, to 94 million yards, valued Rs.135 lakhs. The major portion of this trade is still enjoyed by the United Kingdom, although the imports from Japan are steadily approaching those from the United Kingdom. The arrivals from the United Kingdom fell from 63 million yards, value Rs.104 lakhs to 41 million yards, value Rs.73 lakhs, while those from Japan receded in only a slight degree from 56 million yards, value Rs.64 lakhs to 53 million yards, value Rs.62 lakhs.

WHITE PIECEGOODS (BLEACHED)

The fall in the total imports in these goods were also appreciable from 263 million yards, value Rs.498 lakhs during the year ended March, 1936, to 219 million yards, value Rs.449 lakhs in the period under review. The United Kingdom maintained approximately her large proportion of this trade, her imports being 199 million yards, value Rs.390 lakhs in the year ended March, 1936, and 164 million yards, value Rs.344 lakhs in 1936-37. Imports from Japan in the two years in question were 58 million yards, valued at Rs.84 lakhs in 1935-36, and 48 million yards valued at Rs.75 lakhs in the year ended March, 1937. The sendings of Switzerland registered an increase from 3.5 million yards, value Rs.14.6 lakhs to 4.7 million yards, value Rs.19.9 lakhs ; imports from the Netherlands also showed a small increase from 1.4 million yards, value Rs.4 lakhs to 1.6 million yards, value Rs.4.4 lakhs.

PRINTED PIECEGOODS

The total import trade in these goods fell from 218 million yards valued at Rs.332 lakhs to 187 million yards valued at Rs.301 lakhs. The position of the United Kingdom as compared with Japan, however, in this trade became more unfavourable as the imports from Japan, although registering a small decrease in quantity, showed an actual increase in value, the figures for the two periods in question being 150 million yards valued at Rs.181 lakhs 1935-36 as compared with 137 million yards valued at Rs.192 lakhs in the year ended March last.

DYED PIECEGOODS

The total volume of the trade fell from 103 million yards valued at Rs.240 lakhs to 81 million yards valued at Rs.209 lakhs. The great bulk of this trade is enjoyed by the United Kingdom whose sendings were 78 million yards valued at Rs.198 lakhs in 1935-36 as compared with 63 million yards valued at Rs.170 lakhs in the year ended March, 1937. The corresponding figure registering Japanese shipments were 20 million yards valued at Rs.29 lakhs in the former period and 13 million yards valued at Rs.23 lakhs in the year ended March last. As regards the small residue attributable to "other countries," Switzerland was responsible for 2.2 million yards, value Rs.8.1 lakhs in 1935-36 and 2.8 million yards, value Rs.9.1 lakhs in the period under review. The small ship-

ments from Italy showed some increase from .36 million yards, value Rs.1.1 lakhs to .66 million yards, value Rs.2.4 lakhs.

WOVEN COLOURED PIECEGOODS

There was a reduction in the total import trade in the two periods in question from 30 million yards valued at Rs.73 lakhs to 14 million yards valued at Rs.40 lakhs. The reduction was shared by the two principal countries of supply, namely, the United Kingdom and Japan. Arrivals from the United Kingdom fell from 8.7 million yards valued at Rs.28.3 lakhs to 3.5 million yards valued at Rs.14.7 lakhs.

FENTS

There has been a change in Classification from the 1st of April, 1936, from which date sub-divisions are given for (1) cotton fents not exceeding 4 yards in length, (2) silk, artificial silk, silk mixture or artificial silk mixture not exceeding 2½ yards, and (3) other materials not exceeding 4 yards in length. For the year ended 31st March, 1936, one category only is given, namely, fents not exceeding 4 yards in length, of which the total trade in that year was 48 million yards valued at Rs.71.8 lakhs. Of this trade Japan secured the great bulk, namely, 34.7 million yards valued at Rs.55.4 lakhs. Arrivals from the United Kingdom in that year were 7.6 million yards, value Rs.9.6 lakhs and from the U.S.A. 6 million yards, value Rs.6.4 lakhs.

In the year under review the imports in the above-mentioned three categories were as follows :—

- (1) (Cotton fents not exceeding 4 yards).—32 million yards (6.5 million *lbs.*), value Rs.40.1 lakhs.
- (2) (Silk, artificial silk, etc., not exceeding 2½ yards).—6.9 million *lbs.*, value Rs.56.3 lakhs.
- (3) (Other materials not exceeding 4 yards).—2 million *lbs.*, value Rs.1.3 lakhs.

As regards the share of the countries of supply in the year under review, the arrivals from Japan were 11 million *lbs.*, value Rs.82.6 lakhs. Arrivals from the United Kingdom were 1.8 million *lbs.*, value Rs.12 lakhs and from the U.S.A. .6 million *lbs.*, value Rs.2.8 lakhs.

It will thus be seen from a comparison of the value of the fent trade in the two periods in question that the share of the United Kingdom has increased from Rs.9.6 lakhs to Rs.12 lakhs while the share of the U.S.A. has fallen from Rs.6.4 lakhs to Rs.2.8 lakhs. Arrivals from Japan have increased in value from Rs.55.3 lakhs to Rs.82.6 lakhs.

COTTON SEWING THREAD

There was an increase both in quantity and value of this trade during the year under review from 2 million *lbs.*, value Rs.52.7 lakhs to 2.5 million *lbs.* value Rs.57 lakhs. Of this trade the United Kingdom secured as usual, the major portion, her sendings increasing from 1.6 million *lbs.* valued at Rs.43 lakhs in 1935-36 to 1.8 million *lbs.* valued at Rs.45.7 lakhs in the year ended March, 1937. The share of "other countries" rose from .4 million *lbs.*, value Rs.9.6 lakhs to 7 million *lbs.* value Rs.11.6 lakhs.

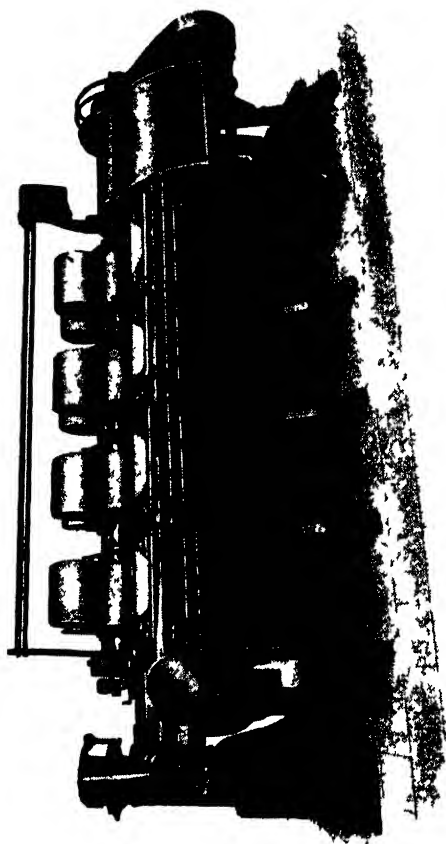


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The Lancashire Cotton Industry

The views of the Joint Committee of Cotton Trade Organisations with regard to the present and the future positions of the Lancashire cotton industry are clearly stated in a memorandum published recently by the Committee.

The book outlines the statistical position and the decline in overseas markets which had the result that by the middle of 1936, nearly a quarter of the existing plant in each section of the industry was in excess of requirements. Technical and economic research efforts and experiments in reorganisation have been carried out, but it has long been evident that no potential economies and no practicable reductions in wages and costs could have brought costs down even to the prices which have actually been quoted during the last few years. Nevertheless, Lancashire has come through the depression and proved its essential soundness. It has successfully adapted itself to the demand for new products, for example, carrying the use of rayon and mixtures to a higher stage of development than in any other country.

The cotton trade is more active than it has been for some years, but the rise of confidence does not mean complacency. There is actually very little room for satisfaction, so that the increased activity is rather to be looked upon as an opportune period for measures of reform and for consolidation.

In the view of the Joint Committee the needs of the cotton industry are essentially simple. Subsidies would only expose the industry to retaliation, and compulsory amalgamation has few responsible supporters. The demands are really two only, and can be summarised as follows :

1. The preservation of its overseas markets by the aid, where necessary, of the British Government, so long as the present system of bilateral trade bargaining continues. More might be done in countries which are bound together with the United Kingdom by mutual political and economic interests. Of these India is obviously by far the most important.

2. Facilities for internal reorganisation, with a view to strengthening competitive ability in export trade. Prices even yet are unstable and rarely profitable. Those engaged in the industry must be given a larger

measure of security and confidence. Responsible organisations in Lancashire are convinced that this end cannot be attained except by statutory authority.

A strengthened cotton industry could probably make a more valuable contribution to the nation's export trade than any other industry.

The Japanese Cotton Industry

The following is extracted from a survey entitled, "Cotton, Cotton Goods, and World Trade," prepared by the National City Bank of New York and printed in a recent issue of *British Industries*, published by the Federation of British Industries :—

The first power-driven cotton mill in Japan was equipped in 1862, with 5,000 spindles, imported from England and operated by water-power, which is abundant in Japan, and is one reason for its low cost of cotton goods. The industry developed but slowly, for Japan had no modern industries then, or capital for their development. By 1885 Japan had acquired approximately 300,000 spindles.

The war with Russia (1904-05) gave Japan a serious set-back, financially and industrially, making capital hard to obtain and being followed by hard times. Nevertheless, by 1910 Japan had 2,000,000 spindles, and in 1914, when the World War broke out, it had 2,500,000. This equipment had been acquired abroad, and paid for with patient Japanese toil and thrift, by means of Japanese exports, chiefly raw silk produced on the little "farms," and largely by women and children, in addition to the family food. Then came the World War and Japan's opportunity. The War's interference with British exports of cotton goods,

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together with the great rise of prices in Europe and America, opened world markets, and especially the markets of Asia, to Japanese goods, and the profits created capital rapidly. By 1920 Japan had 3,800,000 spindles and in 1922, 4,500,000.

At this time Great Britain had approximately 60,000,000 spindles and the United States 37,000,000 or together 97,000,000, which was 60 per cent. of all the cotton spindles in the world. If the countries of western and central Europe be added, the entire group held 84 per cent. of all the spindles of the world, while all Asia held but 8 per cent.

In 1923 came the earthquake and fire, which destroyed Japan's capital and chief seaport, and seemingly wrecked the nation financially, but the Japanese people drew their belts tighter, and industrial development went on. At the end of 1936 the Japan Cotton Spinners' Association reported 11,850,000 spindles under its control, and these spindles, up to date and efficiently handled (together with double labour shifts), used more cotton in 1936 than all the spindles of Great Britain or of any other country, excepting the United States.

Japan has two associations of cotton goods manufacturers, viz.: "The Japan Cotton Spinners' Association," composed of approximately 60 important corporations, and "The Nippon Union of Cotton Textile Manufacturers' Association," composed of middle-sized and small loom operators, controlling, in the aggregate, 5,590 weaving establishments belonging to 67 textile unions, all engaged in making cotton cloth, and scattered widely over Japan. These units range in size from the largest one, having 600 power-looms and 300 workers, down to those having but one, or a few, hand-looms with family workers, or employees, and usually not more than ten looms. These factories buy yarn from the large spinning companies and produce the greater part of the cotton cloth made in Japan.

The primary function of the big spinning corporations is to supply yarn to these weavers. The latter sell to the "Japan Cotton Merchants' Union" or the "Cotton Yarn and Cloth Exporters' Union," which are the principal channels through which cotton cloth is distributed. The corporations doing both spinning and weaving sell their surplus abroad, but it would make trouble in Japan if they restricted sales to the thousands of small weavers in order to increase their sales for export. The weavers have the first claim on the yarn production, and all parties work together harmoniously.

The cotton goods industry of Japan has followed the pattern of the silk industry, in being closely related to agriculture; and the wages of workers naturally are on a corresponding scale. Moreover, so many Japanese industries are thus related to agriculture that the agricultural wage is a tie between them all, and all wages and prices are necessarily related to the purchasing power of the mass. These conditions are important in considering the feasibility of any plan for inducing Japan, China and the remainder of Asia to join a world movement for raising wages and prices, and shortening working hours.

U.S.-JAPANESE TEXTILE QUOTA JOINT COMMITTEE

The United States group of the U.S.-Japanese cotton textile industries joint committee, created under the recently negotiated Japanese cotton piecegoods quota understanding, held its first meeting at the offices of The Cotton-Textile Institute in New York City on April 14. The entire personnel of the committee has been completed. The committee consists of 10 members, five representing the American cotton-textile industry, and five representing the Japanese industry. There are three of the American group resident in the United States, and two resident in Japan; with three of the Japanese group resident in Japan, and two resident in the United States.

The purpose of this committee is two-fold; firstly, to function as the administrative agency to deal with the operation of the prevailing quota arrangement on exports of Japanese cotton piecegoods to the United States, covering the years 1937 and 1938, and to negotiate for renewal of this arrangement; and, secondly, to undertake negotiations for extension of the quota principle to cover other classifications, such as products fabricated from cotton piecegoods, including table cloths, bed spreads, handkerchiefs, cotton gloves, underwear, "and other specialty items manufactured from cotton cloth, and yarns or thread." In the piecegoods arrangement effected in Osaka in January, the Japanese manufacturers accepted the principle of quota limitation on such products, and agreed, with the American delegation, to work toward the establishment of quotas on them by June 30, 1937, or as soon thereafter as practicable.

TECHNICAL CONFERENCE ON THE TEXTILE INDUSTRY

A technical tri-partite Conference on the textile industry, convened by the Governing Body of the International Labour Office, was held at Washington (in accordance with a suggestion made by the President of the United States) from April 2 to 17. The number of countries represented was 27, of which 15 sent complete delegations comprising representatives of Governments, employers and workers.

After a general discussion, the Conference set up a Committee of 18 members to consider questions concerning the statistics relating to the textile industry. This Committee submitted a report (to which was attached the report of a sub-committee dealing with certain questions relating to the economic statistics of the industry) drawing attention to the deficiencies in the available data, and making recommendations as to the lines along which internationally comparable statistics for the textile industry might be developed. These reports were adopted by the

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Conference, subject to reservations by various employers' delegates on one point concerning the collection of data relating to costs of production.

For the discussion of the economic and social aspects of the textile industry, the Conference proceeded to sit as a general committee, consisting of all the delegates of the States represented, and two reports were prepared, dealing respectively with the economic and the social problems of the industry. These reports together with the reports of the Statistics Committee and Sub-Committee, were adopted by the Conference.

HOURS OF WORK IN THE TEXTILE INDUSTRY

The International Labour Conference was held at Geneva during June, when the question of a draft convention for a 40-hour working week in the Textile Industry was discussed.

On June 21, in the preliminary vote, the convention was adopted by 72 votes to 40, whilst on June 22, in the final record vote in full Conference, the draft convention was adopted by 88 votes to 41, thus securing the necessary two-thirds majority by a margin of two votes.

It is interesting to recall that of the 88 votes cast in favour of the Convention, 51 were cast by Government Delegates. Of these 51 Government votes, 25 were cast by Government Delegates of States none of which is recorded as possessing more than 160,000 raw cotton spinning spindles (as compared with 39 millions in the United Kingdom), or more than 4,000 cotton looms (as compared with 504,000 in the United Kingdom).

EGYPT

The textile and allied industries have shown the most marked development among new industrial enterprises in Egypt and, according to a rough estimate, they produce approximately 30 per cent. of local consumption. Next to the Government, the Bank Misr (the most important Egyptian-owned banking institution) occupies an increasingly prominent place in various activities, especially in the textile industry. The operations of the Misr Co. for Spinning and Weaving at Mehalla-el-Kobra and of the Filature Nationale d'Egypte at Alexandria (which hold the dominant position in the textile field) continued consistently upward in 1936. The latter has recently enlarged its factories at Alexandria and has also formed subsidiaries, such as the Société Egyptienne des Industries Textiles. The initial capital of this subsidiary concern amounted to £80,000 but was raised to £E400,000 in 1936, half of it being paid in by the Calico Printers' Association Ltd. and the Bleachers' Association Ltd. (both of Manchester, England), and the other half held by the Filature Nationale d'Egypte. The machinery imported included 1,200

looms and an up-to-date bleaching, printing, and finishing plant, all from the United Kingdom with the exception of a few auxiliary units from Germany. The great majority of the spindles and looms purchased by the Misr Co. for spinning and weaving during the last few years, as well as in 1936, was of British origin, although some new and second-hand equipment of French origin was acquired for a silk mill at Damietta, Lower Egypt (also a subsidiary company of the Bank Misr) and other mills.

The most important development in the textile industry during 1936 was the organisation in April of the S.A.E. "Usines Textiles Al-Kahira" with a capital of £E300,000. The mills and dyeing plant of this corporation, located at Shubra Village near Cairo, have commenced the production of cotton and rayon piecegoods under the supervision of German technicians. The largest portion of the mill's equipment is said to be of German manufacture.

Other textile projects started or completed recently included a mill with 220 Jacquard looms for the manufacture of furniture upholstery fabrics at Alexandria; a silk and rayon weaving plant with 40 new or second-hand looms and auxiliary machines (brought in from Italy) at Alexandria; and a rayon weaving plant at Cairo with 130 looms imported from Switzerland and auxiliary units from Italy.

The demand for domestic knitted fabrics was particularly strong during 1936, on account of the advance recorded in the ready-made shirt and underwear industry and also because of the recent trend toward the use of machine-knit headkerchiefs by the native women. The increased demand stimulated the activities of several knitting and other establishments and a large volume of rayon and rayon-mixed materials (chiefly warp-knit), as well as shawls and scarfs, was produced in 1936. Some seamless hosiery of cotton, rayon, and mixtures is being manufactured in Egypt, but the market's requirements in pure silk stockings, especially in the better grades and finer gauges, are generally filled by importations from the United States.

(Textiles & Allied Products, U.S. Department of Agriculture)

HOURS OF WORK IN THE GREEK TEXTILE INDUSTRY

A Royal Decree was issued in Greece on May 4, 1937, to extend the provisions of the eight-hour day Act to all branches of the textile industry. Previously this was the only section of industry remaining outside the scope of the Act, which now applies to the whole of Greek industry.

The eight-hour day will be applied in the textile industry without any reduction of wages, while workers employed at job rates under the recently concluded collective agreement will receive an increase in wages of 20 per cent. per unit of production.

(Industrial and Labour Information)

HOLIDAYS WITH PAY IN THE TEXTILE INDUSTRY IN FLANDERS

(According to "Industrial and Labour Information," the
International Labour Office publication)

Under the Royal Order of April 13, 1937, ordinary workers and home workers who at the time when holidays are granted are in the service of an employer in the textile industry are entitled to six days' holiday with pay, whatever the number of workers employed in the undertaking. Holidays are granted collectively and by locality between April 1 and October 30; holidays with pay are not granted individually. The six-day holiday period may not be broken up, except in undertakings engaged in dyeing, bleaching, conditioning, etc., where technical requirements so necessitate. The employers may grant the holiday during the most important yearly fair. Remuneration due for holidays is paid in advance at the rate of 2 per cent. of the wages paid by the employer concerned during the months preceding the month on which the first day of holiday falls. The employers concerned must provide the supervisory officials with proof that they have observed these regulations, by producing wage-books and other necessary documents.

COMPETITION BETWEEN RAYON STAPLE FIBRE AND COTTON

Professor Hermann, a director of the Vereinigte Glansstoffabriken, in a recent address to the Institut für Weltwirtschaft, of Germany, discussed the growing competition between rayon staple fibre and cotton. Professor Hermann stated that the difference between the cost of rayon staple fibre and that of cotton has been greatly reduced in recent years, partly by the large decrease in prices of the staple fibre and partly by the increase in prices of cotton. At the present time, said Professor Hermann, the difference between the costs of these two textile raw materials is extremely small, and the tendency is for it to narrow further as the cost of rayon staple fibre is further reduced.

Professor Hermann's statements are quoted in an article in a recent issue of the *Manchester Guardian Commercial*. In that article, rayon staple fibre is referred to by the name of "artificial wool," but that designation should not be taken as indicating that the material in question is primarily a substitute for wool, rather than for cotton. Rayon staple fibre is used in substitution for both cotton and wool. Professor Hermann's statements, as quoted in the *Guardian Commercial*, follow, in part :

" Assuming that raw material costs and wages remain stable, it will be possible to cheapen artificial wool with growing success without giving prices a speculative character. In recent years they have fallen some 25 per cent. They cannot continue to fall at this rate, but the price of artificial wool is continually approaching that of raw cotton; this movement has been aided by the steady rise in the price of cotton. Allowing for the loss in the working of cotton and the additional manipulations needed before it can be spun, the difference between the two materials is almost negligible, especially in the finished product, in which the cost of the raw material to the ultimate purchaser is but a small proportion of the total cost. The proportion, for instance, in cotton underclothing is only 7.6 per cent., and in cotton clothing only some 10 per cent. A 10 per cent. increase in the raw material cost thus adds only $\frac{3}{4}$ to 1 per cent. to the cost of the finished product."

U.S.S.R.

TASHKENT TEXTILE COMBINE.

Built on a formerly unused patch of wasteland that separated the European part of Tashkent from the Asiatic quarter, the Stalin Textile Combine, the first section of which is now in operation, has united the two and ended the disparity in the cultural and industrial levels of the East and West in that city. The combine is the first textile enterprise in Uzbekistan—one of the main Soviet cotton growing centres—built in accordance with the plan to bring industry close to the sources of raw materials and to industrialise the backward regions of the country. The output capacity of the first section, with its 111,300 spindles and 3,264 automatic looms, is 62,000,000 metres of cotton fabrics annually, and this will be more than doubled when the second section is completed.

(Textile Weekly, Manchester)



MISCELLANEOUS

THE GRACE COTTON CO. LTD., LIVERPOOL

We have been officially informed by the above-mentioned company that the shareholders of Messrs. Grace Brothers & Co. Ltd., London, having decided upon the repayment of the capital of that company to its shareholders and as that company owns the entire share capital of Grace Cotton Company Ltd., Liverpool, it has also been decided to discontinue this Company's business in order to make a repayment of its capital to shareholders. All pending contracts and commitments will be handled by them in Liverpool, but except for the purpose of liquidation no new business will be undertaken. Messrs. W. R. Grace & Co., New York, will handle any new business which comes to hand.

The Managing Director of the Grace Cotton Co. Ltd., Mr. Bernard Gelles, will, as soon as the affairs of this Company have been completed, engage as a Member of the New York Cotton Exchange in the Cotton Futures business in New York.

Obituary

NOBILE COMM. COSTANTO CANTONI.

All those connected with the International Cotton Federation, and more especially those who can remember the early years of its existence, will be sorry to learn of the death of Nobile Comm. Costanto Cantoni, which took place on July 12, at his home in Milan.

Comm. Cantoni was Italy's first member on the International Cotton Committee, from the inception of that body in 1904 until 1910. He took a prominent part in the yearly Congresses held during that period and presided over the Sixth International Cotton Congress held in Milan in 1909.

On behalf of the International Cotton Federation, we extend our deepest sympathy to his relatives in the irreparable loss which they have sustained.

Reviews on Current Cotton Literature

"THE CENTENARY OF THE MECH. BAUMWOLL-SPINNEREI UND WEBEREI, AUGSBURG."

The firm of Mech. Baumwoll-Spinnerei und Weberei, of Augsburg, are to be complimented upon the production of such an imposing publication, which must have necessitated much patient and diligent work during the course of its preparation. There are several chapters to the book, which is printed in the German language, and exceptionally well bound. First of all, the history of the firm is dealt with up to the year 1910. The development of the firm during the last twenty-five years is then described, with special reference to the important technical changes which the works have undergone since the year 1900. A prominent feature of the book is a series of excellent photographs showing the various stages in the spinning and the manufacturing of cotton.

"THE TRIPARTITE TECHNICAL CONFERENCE ON THE TEXTILE INDUSTRY. FIRST PART OF THE RECORD OF PROCEEDINGS." Published by the International Labour Office, Geneva, London Office, 12 Victoria Street, S.W.1. Price 2s.

The book contains an introduction to the proceedings of the above-mentioned conference, held in Washington during April 1937, as well as the list of delegations and the reports adopted by the conference.

"THE INTERNATIONAL YEARBOOK OF AGRICULTURAL STATISTICS, 1935/36 AND 1936/37." Published by the International Institute of Agriculture, Villa Umberto 1, Rome.

A most comprehensive and useful book containing upwards of one thousand pages giving details of the area and population of the world; area, production, and yield per hectare of the principal crops; details of imports and exports of all countries; prices of the various agricultural products, etc.

"THE EMPIRE COTTON GROWING REVIEW." Published by P. S. King & Son Ltd., 14 Great Smith Street, London, S.W.1, for the Empire Cotton Growing Corporation. Quarterly, Price 1s. Annual subscription, 5s. post free.

The July issue of the Review contains many articles of interest to cotton men, prominent amongst which are the following:—

Some Cotton Problems of South Africa, by S. Milligan.

Cotton Growing and Breeding in the Anglo-Egyptian Sudan, by T. Trought.

Recent Cotton Legislation in the Bombay Presidency, By W. J. Jenkins.

"THE ALEXANDRIA FUTURES MARKET," by C. R. Barber. Copies obtainable at the offices of the *Egyptian Gazette*, Alexandria. Price 5s. net.

The writer has frequently been called upon to enlighten students of Egyptian cotton matters—among them bankers and accountants un-specialised in cotton finance, business men engaged in other branches of commerce, new recruits to the cotton trade itself and others whose interest has been purely academic—on one aspect or another of the "futures" system, and to define in plain language such terms as "hedge," "call," "basis," "price-fixing," "tenders," which are the verbal stock-in-trade of the cotton man but which convey no intelligible meaning to the layman. A vocabulary of the jargon of the markets would not greatly help a reader unfamiliar with the processes to which its definitions related. Something more explicit than a mere glossary yet more concise than most of the existing text-books on the subject of cotton futures in general was required, and in this connection, Mr. Barber's book, which is concerned with the functions, mechanism and terminology of the Alexandria Futures Exchange in particular, will be of immense practical assistance. We recommend it highly to all those in any way connected with the Egyptian cotton market.

"MODERN DRAFTING IN COTTON SPINNING," is the title of a book by J. Noguera, of Prestwich, Lancashire, published by Chorley & Pickersgill, Leeds. Price 9s. 6d.

The author begins by examining the real object of drafting in cotton spinning and its importance within the whole sequence of operations ranging from the bale to the finished thread.

This "drafting" or spreading out of the fibres is the operation generally referred to when speaking of drafting in cotton spinning. It should result in a final strand or thread complying as nearly as possible with the following conditions:—

- (a) Evenness.
- (b) Regularity in weight per unit length.
- (c) Fair distribution of the short and long fibres, and
- (d) Regularity in the relative position of the fibres.

The present book is partly a reprint of one issued by Mr. J. Noguera two years ago, revised and with considerable additions. There are eleven sections embracing the different systems of high drafting, economics of high drafting, the Casablancas system of today, the practical utilisation of the Casablancas system, etc.

Statistical data, graphs and illustrations add particular interest to the book and it should prove valuable to cotton spinners at a time when efficiency is so essential to the spinning industry.

(Cotton, Manchester.)

"THE LANCASHIRE TEXTILE INDUSTRY, 1937." Published by Messrs. John Worrall Ltd., Oldham. Price 15s. post free. Abroad 17s. net. Pocket edition 12s. 6d.

The fifty-third annual edition of this valuable directory and reference book is well up to the excellent standard of its predecessors. The contents of the book include the following :—

Directory of the Textile Manufacturing Districts of Lancashire and adjoining textile districts. Approximately 2,000 firms, with full particulars of equipment, counts spun, goods manufactured or treated, personnel, holidays, pay days, etc.

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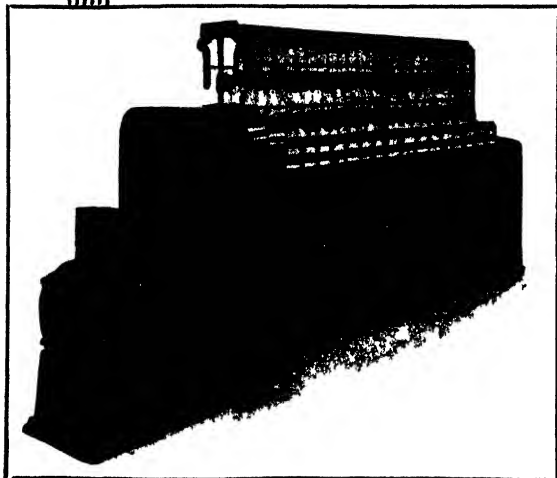
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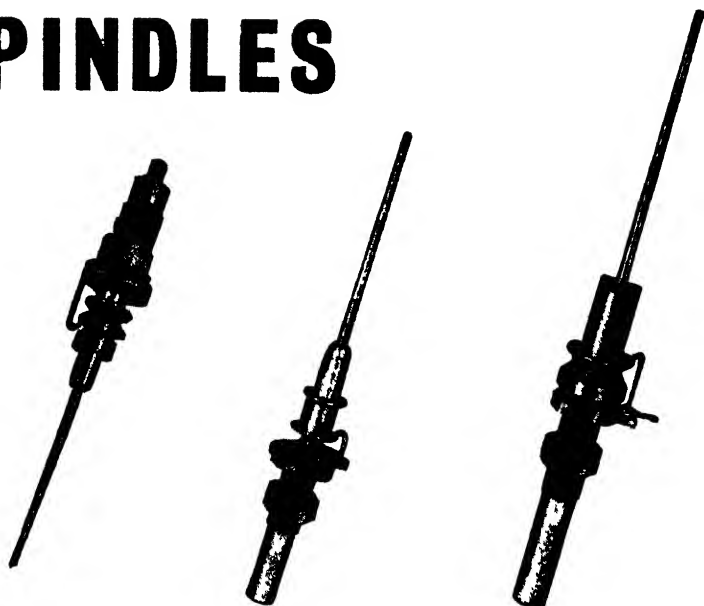
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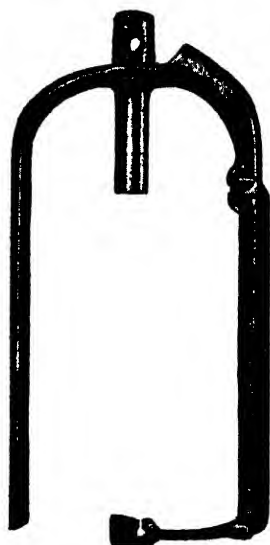
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(International Cotton Bulletin, No. 44)									
1935—ITALY (Milan-Rome)	0	10	0
(International Cotton Bulletin, No. 52)									

All other Congress Reports are out of print.

Other Publications.

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